


What You Need to Know About Moving Your Household Goods to Mexico



What to do before moving
All about the Menaje de Casa
Helpful hints to lower anxiety and increase joy

*Presented
By*



Written by Chuck Bolotin
Illustrated by Jet Metier

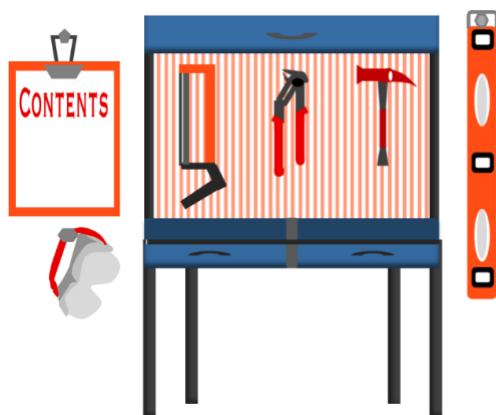


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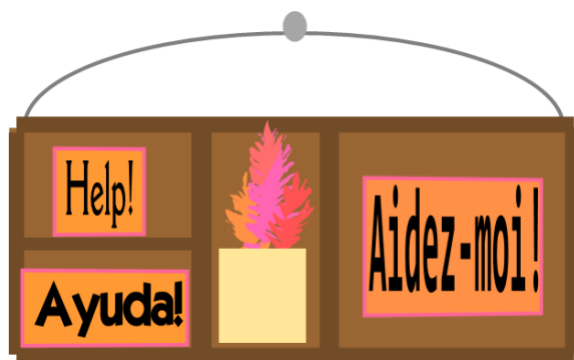


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Who This Guide Can Help



Congratulations on your upcoming move to Mexico!

You're probably very excited about moving.

You may also be a bit bewildered.

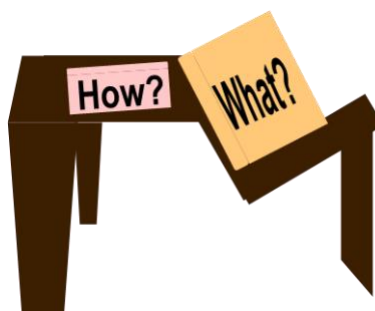
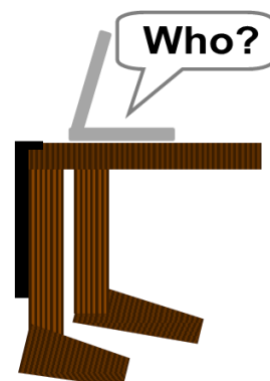
And a bit anxious.

Or overwhelmed.

Or frustrated about not getting the same straight answers more than once, whether from Facebook or other "experts."

If you would rather have a different experience and are searching for an easy to understand and execute moving to Mexico roadmap, with you equipped with simple tips and clear, usable information to smooth your way and increase your happiness, this guide is for you.

As they say in Mexico, *Adelante* (forward!)



Why We Did This Guide (Our Story)



Chuck and Jet Bolotin, formerly of Oro Valley, Arizona

I had expected it would be easy, but it wasn't turning out that way.

About a year earlier, my wife Jet and I had sold our home in Arizona, sold, gave away or put into storage everything that couldn't fit into a big white van, and left to drive through Mexico. Speaking very little Spanish and with only a vague idea of where we were going, we crossed the border in California and over the next eight months spent time in most of the major expat locations in Mexico, from Baja California to Nayarit (north of Puerto Vallarta), the Lake Chapala area, San Miguel de Allende, Merida, and Quintana Roo (Cancun, Playa del Carmen, Tulum), all the way to the border with Belize.

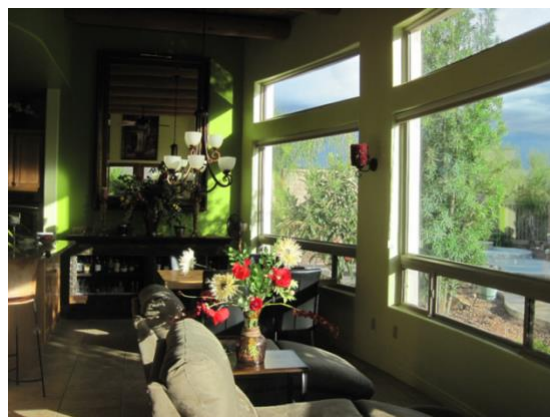
A few months after our trip was over and we were settled in where we wanted to live, it was time to bring down our cherished household goods, at that point patiently waiting for us (while incurring substantial monthly fees) in a self-storage unit in Arizona.

Jet daydreamed about how nice her Balinese carved bar would look in our new Mexican home; how she would lazily browse her cherished photo albums; that she would have all her books about her, collected over a lifetime of joyous reading; how she would retrieve the rest of her clothes, not just the same ones she had been wearing over the last year; as well as her collection of China and beautiful place settings and all the kitchen implements she used in order to lovingly create lavish and wonderful meals for our family and our guests...

It sounded great.

And, compared to our recent and successful adventures over the last year, how hard could it be?

Our simple plan was to get some estimates from the local movers, choose the best one, rescue our beloved items for a reasonable price, and go forward to enjoy our new lives with our old stuff.



The Bolotin dining area in Arizona, with large dining room mirror, carved bar, six-piece dining room set, lighting fixtures, big vases, artificial flowers, lounge chairs, and side table.

But it had been two weeks since I asked Jet to get the quotes from the moving companies. I knew she was eager to retrieve her items, and yet, even after me asking several times, she still hadn't shown me anything.

Something was wrong.

It turned out that the reason she hadn't shown me the quotes was that she was afraid to show them to me.

She was afraid that that when I saw the price, I would say "no."

She may have been right, at least in part.

It's true; I thought the prices were outrageous. But not only that. The quotations were for a different amount than we told the moving company we wanted to move, which was odd, because we were quite clear on how much space our items took up at the self-storage unit. Then, when I read the proposals and all the accompanying information and when I called or wrote the moving companies who had given Jet their proposals, I couldn't get a straight answer from any of the companies or clarity on a whole bunch of topics, let alone a timely return call.

I went from blissful and ignorant naivete before getting our quotes to increasing frustration afterwards. There seemed to be a lot of rules and other issues the moving companies told me were my responsibility and that if I didn't cross every "t" and dot every "i", terrible things would happen to me like fines and confiscations and additional costs that I was 100% responsible for,



Filling our storage unit with our irreplaceable belongings.

not the moving company, even though they were the "experts" and I was becoming aware of all this for the first time. Making things even worse, much of the information they gave to me through their website and other places was not 100% clear; rather, it was outdated or contradictory. To put it mildly, it was not confidence inspiring.

Slowly at first, and then in a flash, it occurred to me: our beloved household goods were being held hostage in a storage unit less than a two-hour drive from the border.

Not at all satisfied with the existing alternatives, I set out to release our captive household goods by doing it myself. Given that we had been in Mexico by that time for more than a year, I had developed some street smarts and prior to that I had a background of figuring out alternative ways of doing things, so I approached the challenge of emancipating our treasured household goods as just one more task, albeit with a different set of things I had to understand.

Several months into this process of hearing or reading something promising and finding out it was all pretty much a fraud, then chasing down another, different promising lead which took me to another dead end, and then repeating the process again, it began to occur to me why it

was so expensive to move our household goods through the traditional movers—it was really, really difficult to find a way around them.

As Jet become increasingly worried, I became even more intrigued by the mystery of it all, because it began to dawn on me that, if I could figure it out, perhaps there was a business opportunity for me to help others who, through a similar experience, had given up, given in, paid out, and just went with the established movers.

I was pretty confident that, eventually, I could do it.

The reason I was so confident was that I had started, funded or ran several startup companies



Chuck Bolotin lecturing MBA students at the Eller College of Management at the University of Arizona.

in the US, guest lectured at a graduate business school and sat on the selection committee of a prestigious group of inventors. And most of these companies I was involved in had very little in common—I had sold electronic office equipment when it first came out, started a company to develop hand-held electronic medical records, helped graduate business school students with all sorts of business plans, and even re-positioned a device originally designed to check for the presence of weaponized bioweapons to successfully sell it to pharmaceutical manufacturers, all without originally knowing any more than high school microbiology. Compared to all of this, how hard could it be to figure out the move to Mexico business?

Over yet several more months, I found out: it turned out to be harder than re-positioning anthrax-detection devices for pharmaceutical manufacturing.

I spent close to a year talking with trucking companies, customs brokers, customs agents, packers, loaders, “guys with trucks” in the US, *hombres con camiones* in Mexico, insurance companies, several Departments of Transportation (both federal and in several states), immigration experts, and others. As a result of lots of inaccurate or misleading information, I was wasting months of my time.

One of the reasons it was so difficult was that, of the people who actually knew, no one wanted to tell me what was actually going on. It was like they had their own little club, and I just wasn’t part of it.

It was frustrating and it was time consuming. Friends and relatives counseled me to give up and just pay the other movers. Every few days, Jet would ask me again (gently and patiently,

but often) when we could bring home her treasured items. After a while, my joking and always true answer was “We’ve never been closer.”

It was a labor of love, and a long one. Jet wanted her precious belongings that she ached for and I wanted to give them to her, but while keeping a good portion of our net worth and with a reasonable expectation of a successful move, one in which I felt confident of the outcome because I had my questions answered and knew what would happen.

Yet more time passed.

And we kept paying my monthly bills at the storage unit.

After about a year, I had finally figured it out. Through persistence and then some good luck, I had completely broken down and fully understood each component of the moving to Mexico process. Then, I re-built the process in a way that made more sense to me, getting rid of the parts that were too expensive, redundant, or just an artifact of “how it’s always been done” that added costs and confusion. I kept the good parts, added some of our own ways of doing things, and set up our network to the highest standard.

I thought it would work and it felt like it would work, but I hadn’t actually tried it. And you never know in business when you try something different than the others that *should* work in theory that it actually *will* work in reality.

Eventually, our big day came. We would try our process by experimenting on ourselves, with Jet and me as our own guinea pigs and all of Jet’s precious belongings then in Arizona as the potential prize.

To our happy surprise, our own move came off pretty much flawlessly... and saved me lots of money. Of course, Jet was thrilled. (You can see the video of our first move here: <https://youtu.be/VYnPP96iSpw>)

We then tried our process with our first customer, which also went really well.



Chuck Bolotin serving his clients’ needs moving to and from Mexico.

We were in the “Move to Mexico business.” In our first full calendar year of operation, with no real promotion, our clients found us, and we successfully moved 62 families.

Our goal has been the same from the beginning: simplify the process, treat our clients during an important and vulnerable time in their lives as we would have like to have been treated, and save our clients money.

This guide is for those who were in the situation Jet and I were in a few years ago, trying desperately to find a reasonable way to be reunited with their household goods. If we can't help you or you choose someone else, that's OK; I wrote this guide in order to help everyone and I believe you will find it useful, whichever road you take.

This guide is just our way of making it easier for you and showing gratitude for the gifts we've been given to live in Mexico and to have a successful business helping others. I consider it an honor to be part of this very import part of people's lives in any way we can help.

We've learned a lot since Jet and I crossed into Mexico, and I'm happy to share it here with you here.



Chuck and Jet Bolotin working their vacation lifestyle in Mexico.

Relevant links and other resources:

Our first move video:

<https://bestmexicomovers.com/videos/>

Our Year on the Road and Living in Mexico (free eBook download): <https://bestmexicomovers.com/our-year-on-the-road-living-in-mexico/>

Articles by Chuck Bolotin about living Mexico in Forbes, Fortune, and other publications:

<https://bestmexicomovers.com/press/>

Questions and Answers about life in Mexico:

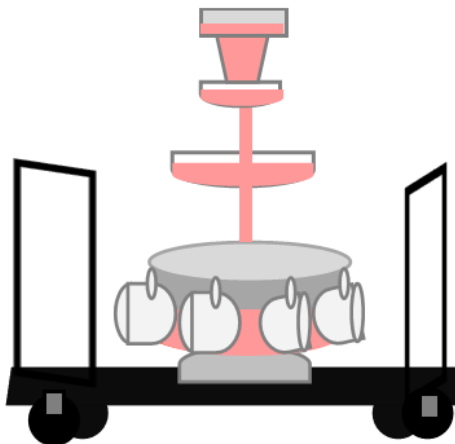
<https://bestplacesintheworldtoretire.com/questions-and-answers/mexico/>

Expatriate Stories about life in Mexico and other places:

<https://bestplacesintheworldtoretire.com/stories/>

Other YouTube's about life in Mexico: <https://www.youtube.com/channel/UChVBZqHX-xYFP5vSM0zOpdQ/playlists>

Jet 's Take



(Yes, I did bring
my punch fountain)

Mexico is a beautiful land where fond images of water, sky, mountain, jungle and mysterious vale thrive outside one's doorstep. Its foreign residents include stolid pensioners, light-hearted snowbirds, fortunate full-timers and those still working, who live in homes made of simple and quotidian materials such as stalwart brick and cement blocks. But in the hands of local artisans, these materials become living reminiscences of ancient temples: enduring soaring bovedas and arched-lined patios, inset niches, internal courtyards and merry fountains, outlined and filled with deep-hued tiles extravagantly displayed and colored walls that shimmer in the heat, like bright cactus flowers after the monsoon or drowsing at dusk like the muted scales of undersea drifters.

It is not uncommon for expats in Mexico to fall in love with a house within three days of arrival, for homes in Mexico are bold charmers and promise a neo-paradise to all who pass through their secret gardens and shaded bowers of honeyed flowers.

If you have decided to make Mexico your home, you are to be congratulated. Now you must set about the task of making your home an architectural reflection of yourself, one that suits the contours of your body, filled with the repositories of your reticent histories and much-remarked travels, to be made into the workshop of your dreams; a place to proffer others a cooling drink and for you to take your diurnal and sweet siesta.

The images I created and scattered about in this guide represent what we have brought to Mexico for our clients: piles of feathered bedding and equestrian wear, kitchens outfitted with vintage Tupperware and Greek coffee grinders, full studies that would have new views of waving papaya trees lit at night by our clients' noble lamps. I have read our clients' manifests, the listing of practical tools and heritage furniture. I have witnessed the contents of music rooms coddled into furniture blankets for their move.

In order for me to explain what is possible and what others brought, I depicted items such as metal art, fireplace footstools, a homey barbecue smoker and a behemoth Pilates reformer. If treasured possessions such as these are yours now, you can know that that you do not have to leave them behind. Bring what you love. Whatever you want to keep is right to be at your side again in your new home. Mexico is a beautiful addition to your life. Take along what makes you happy.

You can read more of Jet's observations and opinions, what she brought to Mexico and what she wished she had (her "take"; pun fully intended) at the Jet's Take section of the Best Mexico Movers' website: <https://bestmexicomovers.com/jets-take/>



What You Can Believe

The guide you are now reading is written from my own, personal perspective, and is the result of:

- 1) what I've learned firsthand;
- 2) what other people have told me that I've put into practice; and,
- 3) what I believe to be true.

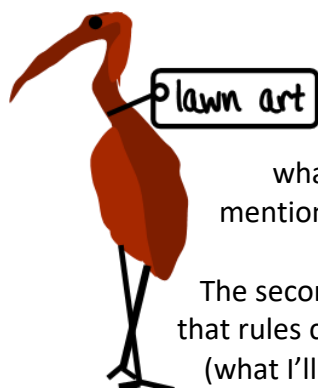
If you and I were to have a series of conversations over the phone, the information in this guide is what I would advise, along with several caveats on the subjects about which I am not an expert.

Whenever receiving information from any source on the subjects covered in this guide, you should always be skeptical, which ties into why so much information you read and hear on the topic of moving household goods to Mexico contradicts other information you read or hear about moving to Mexico or is just plain wrong.

If you've been researching your move to Mexico for a while, you know exactly what I'm referring to.

I talk with people all the time who are extremely frustrated, confused, and overwhelmed. And not rarely, I talk with someone who acted on advice they've heard or read from others that I know to be wrong; advice which winds up costing them a lot of time and / or money. Then, when they find out, to their other emotions, they add exasperated.

Why is this? Why can't you just get some straight and simple answers and get the same answer from everyone?



The first reason is that many people you talk to or whose answers / advice you read (maybe on Facebook) are just plain wrong. They act as if they are experts but have no accountability and have no idea of what they're talking about. Caution: there are lots of these people. (Did I mention Facebook?)

The second reason it is so difficult to get simple, clear and accurate information is that rules change in Mexico more often than they change in the US or Canada (what I'll refer to throughout this guide as "NOB," for "North of the Border").

What may have been true when the person answering the question moved years or even months ago may no longer be true when you move. They're trying to be helpful and their information was accurate for when they moved, but it's not accurate any longer because the rules have changed.

The third reason is something that you will find a lot in Mexico, which is that the rules, laws and regulations and how they are interpreted many times are not enforced in the same way throughout the country. What may be true if you cross your household goods by truck at Laredo may not be true if you arrive by sea at Manzanillo or some other place.



So, given all this, what makes the information in this guide worth reading? How do you know that I'm more qualified than that person monopolizing the conversation in the Facebook group you've just joined?



The first reason is that, unlike many others who have no problem giving expert advice but who don't know what they're talking about, I run a company, so if I give you wrong information, I have something to lose. Can you say the same about "the guy with the truck" or the self-anointed expert on Facebook?

Secondly, as opposed to "the guy," the Facebook "expert" or countless others, we've been successfully moving our clients' household goods to and from Mexico for several years and every day, we deal

with the issues in this guide. We have moved people via land and sea, and to pretty much all of the most popular places in Mexico. We have helped people who do much of the move themselves and those who want us to do pretty much everything. We have moved Mexican nationals and people who haven't even been to the Mexican consulate to ask about their residency visa and don't know why they should. And we do these types of things completely legally, complying with all the laws, regulations, and nuance in every country in which we operate, every day. This is our only business.

All that said, I am not an attorney and I am not qualified to give you legal advice. For anything of a legal nature, please check with a qualified attorney to verify what you read here or read or hear elsewhere. Also check because the rules may have changed from the time I wrote or updated this guide (see above). The very good news is that, for example, immigration attorneys and people to help your car and you be legal in Mexico cost a mere fraction of what they cost NOB and are well worth every peso. If you use us, we will help you with all these issues. If you choose a different commercial moving company than ours, their procedures may be different, so please check with them before proceeding.



Now that we've covered that, let's get to helping you.



What to do Before Your Move

We humans tend to put things off, especially when we are confused, or it seems like what we would need to do is a lot of undefined work. What you are about to read here will clarify and simplify the steps for you to take before your move to Mexico, and as a result, make it a lot less work.

Many of the items in this chapter are not directly related to just moving your household goods, but they are very worth doing. If you know what to do and finish a lot of the tasks that will make your life easier ahead of time, you will not only have lots less to do and worry about during the whole moving process, but afterwards, your life will be much easier as well. Doing things ahead of time is like giving a gift to your future self. I recommend it highly. I've seen people who do these items early and I've seen people who wait until the last minute and do them in a panic. Guess which people are happier and more successful? Which group would you rather be in?



None of this is hard if someone just gives you a roadmap. Here's your roadmap, complete with places for you to put checkmarks. Let's get started. You may want to print out a copy of this guide and then put those checkmarks next to the items you've accomplished. You will enjoy seeing the physical evidence of your progress and it will give you a feeling of control and calm.

Eliminate as Much Paper as Possible

Mailing addresses are wonderful in the US and Canada; no one has the same address as you, your address will show up on Google Maps (and in the right place), and when you give your address to Amazon, Amazon accepts it and can deliver to you.

Not so much in Mexico.

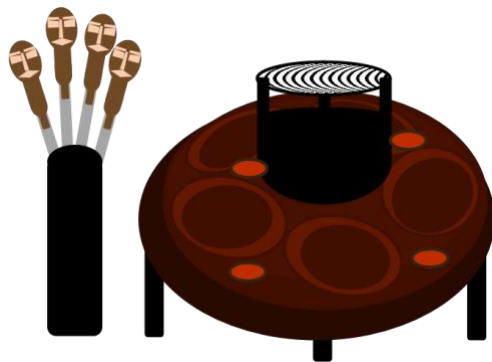
Also, even if some NOB (“North of the Border”; the US or Canada) companies mailing to you in Mexico could send to an address where your mail would actually be delivered, many will not do so.

For these reasons and others, it is a good idea to stop receiving in paper as much as you can while NOB and get everything sent to you digitally, via email or accessed through the Internet. In probably 95% of cases, your vendors, banks, brokerage accounts, credit card companies, etc., will welcome you doing this, and you can do it by just logging into your account on their website, clicking some boxes and giving your email address. If this doesn’t work, you may want to call them and ask for assistance.

Ruthlessly eliminate as many pieces of paper coming to you as possible. There is no downside to doing this now, even if your move is still several months in the future. That way, if something doesn’t work properly or gets lost, you’ll have a chance while still NOB to fix it in a serene way.

Next, look at all your important documents, such as:

- Driver’s license
- Marriage certificate
- Birth certificate
- Residency visa (when you get it)
- Passport
- All you credit, debit, and other cards you have
- Car registration
- Tax returns and receipts
- Your most cherished photographs
- Medical records, x-rays, and any lists of medications you’re taking
- All the other pieces of paper you have that you need from time to time or are especially worried about no longer having



Appetizer platter with tiny hibachi

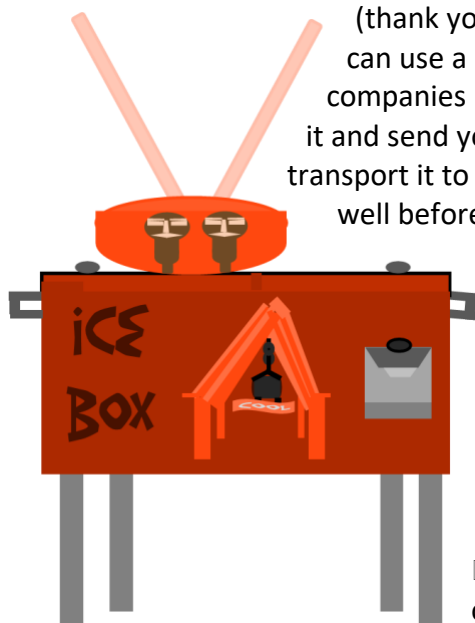
Wouldn’t it be a shame if you lost one, two, or all of them?

In many cases, it would be a complete disaster.

Don't let it happen, at least in digital form.

Create a directory on your computer, create some subdirectories and scan each category of paper into its own directory. Then, just think of how secure and at ease you will feel that there is no way to lose at least the digital version of these important documents and photos and how superior you will feel when someone needs your birth certificate or passport and you can just send it to them right from your computer, without having first to find it and then scan it.

Regardless of how much paper mail you eliminate, you'll still have some. What do you do about that? You can either use your sister-in-law's address where she can collect it for you (thank you, Lisa!), use some other trusted friend or relative, or you can use a commercial service. There are now lots of mailbox companies in the US that will receive your paper mail and either scan it and send you the scan, or even from time to time physically transport it to you in Mexico. Make sure you have one of these in place well before you move.



- ☐ Look at each piece of paper mail you receive. For each one, go to the Internet, to that company's website, and ask for your correspondence to be sent via email.
- ☐ Buy a low-cost scanner or go to Staples, Office Depot or another retailer that can scan for you.
- ☐ Scan each of the paper in the list above into a place on your computer where you can find it.
- ☐ Either ask someone who is stable, you can trust and who will collect your remaining mail for you if they would do it, or contract with a mailbox company who will do it and will provide you with a legal address.

Back up All Your Data

Now that you've put all your important pieces of paper online, think (and more importantly, feel) what it would be like to lose it all. Maybe you drop your computer, or someone steals it, it's lost in a fire, or the hard drive crashes unexpectedly, right in the middle of you using it. Feel your frustration, your anger and your fear. All that data, all those pictures, all those personal papers, completely lost forever. That's nothing you can do about it. Nothing. All gone. You're devastated as you try to figure out your next move, but there really isn't one.

Let those emotions set in and wait a moment before you read the next paragraph.

Now, feel the relief you have because you know that you backed up everything in the cloud. Between the two feelings, this one is better, isn't it?

I use Dropbox to continuously back up my computer, but there are plenty of other backup services that do pretty much the same thing. I can't stress enough how important it is to back up your entire computer to a cloud-based service, so that, if the worse happens, you can just download your saved items onto your new or repaired computer with nothing lost. If you don't know how to do this, ask someone who does, and please get it done.

- ☐ Buy a service like Dropbox for your computer and install it.
- ☐ Back up all your files.
- ☐ Ask a knowledgeable friend to look at what you did to make sure you really did back up all your files and that they can be restored elsewhere.

Visit Your Doctor, Dentist, and Maybe Your Auto mechanic

Whenever you move to a new place NOB, you establish new service providers, and none are more important than your doctor and dentist. Sometimes, this takes a while and sometimes, there's an emergency before you've done it. As with so many other considerations about your move, moving to Mexico is just like that, only more so.



Just before you leave the US or Canada, you may want to have that final checkup at your NOB doctor's office and final dental cleaning at your NOB dentist, just so you don't need a root canal while *en route* to your new home in Mexico or soon thereafter and have to start asking people for recommendations to the local endodontist, all while you've got this throbbing pain in your head. Like so much other preparation, this problem probably won't happen, but if it does and you've planned ahead, it won't be a big deal.



While you're visiting your NOB doctor or dentist, please let them know you're moving to Mexico and ask them for all the documentation and records they have that would be useful to your new doctor or dentist, including your list of any allergies. These records belong to you and NOB doctors and dentists are usually very happy to provide them.

While you're there, ask for a list of medications you take on an ongoing basis. Then, check to make sure you have enough for an extended period of time (well after you arrive in Mexico) and that you can get your medications in Mexico. If you don't have enough, have your doctor write a prescription so that you do.

And while we're on the subject of preventive maintenance, if you're planning on driving your car into Mexico, have that NOB 108-point check enough beforehand so that, if they find something, you can have it fixed before you leave, rather than on the side of the road in Mexico next to a bemused goat in a corn field between two towns whose names you can't pronounce.



- ☐ Make an appointment to visit all your medical doctors. Tell them the reason for your visit and ask them to have all your medical records and a list of medications available for you.
- ☐ Visit your doctor. If necessary, ask your doctor to prescribe enough medications for you to last at least several months after you arrive in Mexico.
- ☐ Take with you your paper medical records and list of medications and then scan them into your computer (see above).
- ☐ Do the same for your dentist.
- ☐ A month before you're ready to leave, have your car checked and consider getting new tires.

Get Up-To-Date

Check the expiration dates on everything, including your:

- Passport
- Driver's license
- Credit cards
- Debit cards

Then consider where it would be easier to renew any of these items-- when you are NOB or when you're a newbie in Mexico. Relative to credit and debit cards, it can be extremely difficult



or close to impossible to get your NOB-based company to send you a new card in Mexico. Just get items renewed early and this will be yet one more problem you will not have.

☐ Check the expiration dates on all the items listed above.

☐ Renew anything now, before you leave, that is due to expire any time soon.

Credit Cards

A “foreign transaction fee” is the amount your credit card company will charge you in order to exchange the pesos you used the card for to make a purchase in Mexico into the dollars your credit card company uses to charge you on your account. Please check to see that any credit card you will use in Mexico has a zero foreign transaction fee.

Next, make sure that whatever credit cards you have utilize a good exchange rate from Mexican pesos. Some are much better than others, and this can really add up. For example, if you buy something in Mexico for 2,000 pesos and your credit card company exchanges your USD dollars at a rate of 20 to one, that 2,000-peso purchase will cost you USD \$100. However, if your credit card company exchanges your pesos for dollars at the rate of 22 to one, you'll only pay \$90.91 for your 2,000-peso purchase. If your credit card company uses the 22 to one rate, it's like getting a 9% discount on all your credit card purchases just for being smart enough to use the right credit card!

Also please check to make sure that your credit card will work in Mexico for an extended period of time. Some cards do this without any intervention needed on your part while some make you indicate that you are on vacation every 90 days or so. If you don't know which policy your credit card company uses, it's a good idea to call them to find out. You don't want to discover how they will react on day 91 while you're standing in the checkout counter at your grocery store in Mexico with all your groceries bagged and six people behind you when your card is declined, the ice cream is melting, and those people behind you in line all wondering what would cause your card to be declined.

Ceylon bookmark

- ☐ For each credit card you have, check the foreign transaction fee and exchange rate.
- ☐ If you are not happy with any of your existing cards, apply for a new one that's better.
- ☐ Make sure that you have replicates of each card, for yourself, and if you're moving with someone else, for that person, too.
- ☐ Find out what the rules are for each card for using it outside the US and make sure you comply with those rules.



ATMs

Lots of expats who live in Mexico don't have a Mexican bank account. Instead, they pay everything via cash or credit card and for larger purchases, via PayPal, wire transfers or ACH (which is like a bank transfer, but generally much less expensive and faster). When they want pesos, they use their debit card at a Mexican ATM machine.

Which card you use can make a very big difference. Consider these features:

Exchange rate. Like above, the exchange rate can matter a lot. Find out which exchange rate your debit card uses. The Capital One card I use exchanges dollars from my US account to pesos at the ATM I stand at in Mexico at using pretty much the same rate as I see on the Internet. (I checked.) I'm sure there are other cards like mine, but there are lots of other cards that are not and use a terrible exchange rate, like the card I used to use.

How much the Mexican ATM machine charges for each withdrawal. When I use my Capital One card at CI Banco, they charge me less than 18 pesos per withdrawal, which is less than one US dollar. I can definitely live with that. There are many others (like that other card in my wallet) that charge a lot more. I have been told that some cards charge even less, so that whatever fees the bank ATM in Mexico charged, that US bank removes entirely.

How much you can withdraw at one time. With some cards, you can only withdraw 3,000 pesos at one time. With others (like my favorite), you can take 10,000 pesos at one time.

Check the deal for your card and if you need another one, get it well before you leave the US or Canada.

After putting this into practice for ATM cards (and credit cards, too, above), what would you do if one of your cards expired and it didn't work any longer, or one got stolen, or you lost it, or the magnetic strip just stopped working? You're not in the US or Canada any more, so you would have to do without your card for probably quite some time.

Maybe that means you can't get cash, or you can't charge on your credit card. Not a good plan. The easiest way to get around this is to have at least two ATM cards from different banking institutions and if you have a partner like I do, get separate cards for your wife or husband. That way, you're covered in two directions.



This brings me to an overall recommendation. Like with so many other things in life (and especially in Mexico), it's always good to have backups. Just like in the moving business, when living in Mexico, I always think, "What could go wrong?" Then, I plan for it, so if things do go wrong, I don't get too upset, because I have a Plan B and many times, a Plan C. This easy way of advance planning and life in general will reduce your related stress and anxiety and the actions needed if things go wrong, to close to zero. Then, you can just enjoy yourself.

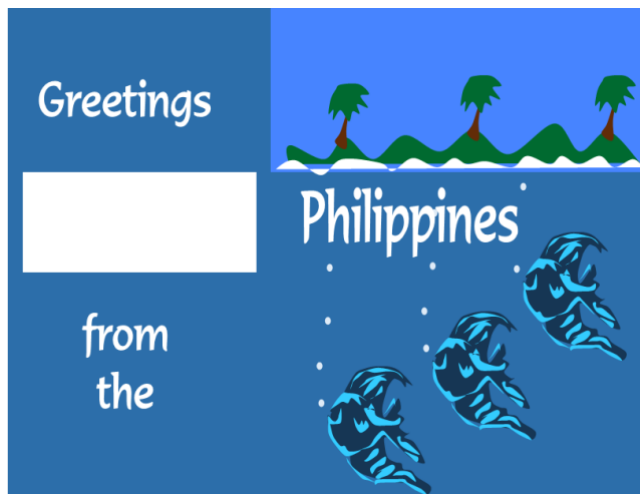
- ☐ For each card, check the exchange rate, transaction fee and withdrawal limit. If you're not happy with any of them, establish a relationship with a different bank that offers a better deal.
- ☐ Just like with your credit cards (above), make sure that you have replicates of each card, for yourself, and if you're moving with someone else, for that person, too

Making Bank Transfers

It won't be all that unusual for you to want to transfer from US or Canadian dollars to Mexican pesos, perhaps to pay someone more money in Mexico than you have in cash. Also, if you

decide to get a Mexican bank account, you'll also have to fund it. If you do this through a bank-to-bank transfer, you can do it through your bank, or alternatively, you can try the service I use, along with lots of other expats: Transferwise.

I like Transferwise for several reasons, including that you can make transfers to pretty much any currency in the world, the exchange rate is very close to what you see on the Internet, and their fees are very low, compared to typical banks. Their customer service has been good, and once you get the hang of it, it is extremely easy to use. Setting up an account, even for future use, is free. If you set up a Transferwise account now and link to one or more accounts where your



money is kept NOB, you won't have to do it later.

- ☐ Find out your bank's policies and how much they charge to do a transfer from dollars to pesos.
- ☐ If you don't like your bank's policies or fees or if you would just like an alternative (always recommended), set up a free account at transferwise.com or some similar company.

Password Manager

Not many people are diligent about their passwords. Maybe you're one of them. Do you ever use the same password for two different sites? Do you have your passwords written down somewhere in hard copy or in a cleverly named Word document? Do you use "strong passwords" that would be impossible to guess (even more so than your date of birth, the date you were married or your dog's name)? Are you aware of "phishing", whereby you think you're on a legitimate company's website like Amazon but you're really not and you use your real password to try to enter the phony site, thereby handing over your password and all the information in your Amazon account to cybercriminals? (That's exactly what I did quite a while ago.)

For these and other reasons, you should get a password manager, especially now that you have pretty much everything online. (See above. You did put pretty much everything online, didn't you?) The one I use is Dashlane, which I recommend highly. It's not expensive, it's a great productivity tool, and it's an excellent way to create and manage passwords. I'm sure there are others that are very good as well. You really should get one of them.

- ☐ Do the research to decide which password manager you prefer.

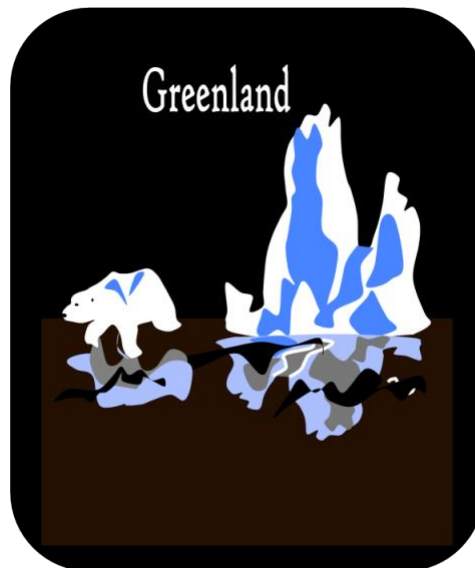
- ☐ Check out [Dashlane.com](https://dashlane.com)
- ☐ Install your password manager on your computer.
- ☐ Follow the directions to completely set up your password manager, including changing your weak passwords into strong passwords and never using the same password twice.

Be Prepared to Use Your Smartphone in Mexico

WhatsApp is an app for your smartphone that allows you to call anyone else with a WhatsApp account for free, anywhere in the world. If your cell phone is connected to an Internet network and you configure it properly, WhatsApp will use your internet connection. If you don't have an internet connection (for example, while you're driving), WhatsApp will use your cell data service.

Why get WhatsApp for when you live in Mexico? Three reasons:

1. Using any cell or landline phone to call any other Mexican cell or landline phone in Mexico is horrid.
2. Essentially everyone in Mexico has WhatsApp. Your housekeeper will have it; your gardener will have it; your architect and lawyer will have it and all your friends will have it. Why do they all have it? Check out Reason 3.
3. Its free and it works.



You may also want to get and / or practice more with Skype. Like WhatsApp, on Skype you can call anyone else with their service at no charge, but on Skype, you can also share your screen and do video calls. While many people NOB have Skype, not many Mexicans do, so you will wind up using Skype mainly to call non-Mexicans. I'm told that Facetime is also good for that type of thing.

While you're at it, you can also get the app for Facebook so that, if nothing else works, you can contact others using your smartphone who are also on Facebook through the app. Backups to backups are important, especially in Mexico.

The other telecommunications issue in Mexico is which service provider to use. If you don't want to keep your US number any longer you can get a Mexican service provider like TelCel, and you can deal with that. (I chose not to.)

If you want to keep your US or Canadian number, you can look for a provider in the US or Canada that will allow you to make calls from and to Mexico / the US / Canada at no extra charge. As of the time of this writing, I recommend Cricket. Cricket is essentially the less expensive version of AT & T and they have a plan where I get unlimited calling, text and data to or from any of the three countries above at no extra charge. And it really is no extra charge, as

opposed to other carriers who argue with you ever few months about how much you're using your phone in Mexico or just arbitrarily charge higher fees. I set my Cricket plan to automatically charge my credit card every month well over a year ago and never heard from them again. It just works.



One of the keys is to get your telecommunications issues done well in advance, so you can be comfortable with them and relax. Like so many other recommendations in this guide, there is really no downside to doing it pretty much now.

- ☐ Set up WhatsApp on your smartphone and practice using it. It's free. (You can also use it to text on your computer.)
- ☐ Set up Skype on your computer and on your smartphone and practice using it. (Skype-to-Skype calls are free and you can get a US or Canadian phone number.)
- ☐ If you use Facebook, put it on your smartphone and practice calling someone using it.
- ☐ If you would like to keep your US or Canadian phone number while in Mexico, ask your existing carrier what plans they offer. If you're not happy with what you hear, you may want to consider switching to Cricket.

Get Apps for Your Favorite Media and Music

While I'm a big fan of immersing one's self in the local culture for a richer and more meaningful experience, I also understand that, from time to time, you may like to listen to more familiar music, radio talk shows, etc. Many apps do this and most (but not all) will work in Mexico.



For music, you may want to try Surfr, which allows you to choose a genre, and then it plays songs from radio stations around the world that play that genre. No charge. You can also listen to Spotify, which allows you to specify music groups you like, for no charge.

Stitcher (free) is good for talk shows, as is Talk Stream (also free).

There's a pretty good chance that whatever you like to listen to NOB can be accessed through an app; even your favorite NOB stations. You may want to start experimenting with them now, before you move.

☐ See if any of the radio programs you listen to have an app for your smartphone. If they do, download it and try it out.

☐ Consider downloading Surfr, Stitcher, Spotify and Talk Stream.

Books, Magazines and Other Things to Read

Even though there are lots of English-speaking people in Mexico, there are extremely few English-language bookstores.

Some of the magazines, such as the fashion and cooking ones my wife Jet likes to read, can be read at your leisure many months after their publication date, perhaps with your feet propped up on your *mirador* while enjoying the sunset and sipping a margarita at your new home. If you have the room, you can take them or, if they are six months old or more, even have them shipped as part of your household goods.

Of course, you can also have used books shipped as part of your household goods, so you can catch up or re-read some of your favorites in your new home in Mexico.

However, if you will ever want something new to read in English, it can be a challenge. Amazon.com.mx will ship some English titles, but the selection as of now is not great. If you can't find it elsewhere, you would want another way. Luckily, the Internet solves this problem.

Consider buying a Kindle or other reader well before you leave for Mexico and practice with it. You'll see that you can download English-language books, magazines and newspapers in seconds, and of course, it will work the same way in Mexico.

- ☐ Consider buying a Kindle or other reader. If you do, try it out while NOB.



Programs and Apps That Help You Communicate and / or Learn Spanish and the Metric System

Google translate is pretty good, especially in a pinch. One of its problems (and this seems to be the case with many of the other translation programs as well) is that the Spanish it translates into many times is the Spanish they speak in Spain, which, if you didn't already know, you will discover can be different than the Spanish spoken in Mexico. That said, Google Translate is much, much better than nothing so it's very much worth having.

I highly recommend learning as much Spanish as possible. You'll feel much more competent and confident, you'll make many more friends, and your life will be infinitely richer. If you don't already know Spanish, you may want to try an Internet website and app that teaches it to you. One of the more popular ones now is Duolingo, which you can access through your computer or your smartphone. Just 10 minutes a day over a sustained period of time will get you a long way. If you don't mind the advertisements, it's free.

For getting around in Mexico, Google Maps works remarkably well, and in English.

In Mexico, when you go to the hardware store, they don't use inches and feet; they use meters. When you talk about how hot it is, your Mexican friends won't use Fahrenheit, they use centigrade. The traffic signs are in kilometers; not miles, and when you go to buy that well-priced T-bone, you'll pay for it in pesos per kilo; not dollars per pound. When Jet bakes Mexican recipes in Spanish, she has to convert to kilograms. Until such time as you've gotten all this mastered, there's Globe Convert, another free app for your smartphone. You can also check the exchange rate on it. Why not install it now and practice with it?

- ☐ Download to your smartphone and your computer and practice with Google Translate.
- ☐ Download to your smartphone and computer and practice with Duolingo.
- ☐ Download to your smartphone and computer and practice with Google Maps.
- ☐ Download to your smartphone and computer and practice with Globe Convert.

Figure Out What to Take and What To Leave, Without Being Bullied

Unfortunately, back to Facebook. Every month or so, I see a question posted to a Facebook group something like this: “How much of my household goods should I move to Mexico?”



As sure as night follows day, you will see answers like:

“Just show up with two suitcases, like we did.”

“You can get whatever you need here in Mexico. Just bring your photos.”

“You’re coming to Mexico to live in Mexico. Don’t bring down all your gringo items! Live the culture here, not like they do in the US, with all its materialism.”

Very rarely will you see a comment from someone who brought down their mattresses, furniture, couches, etc. and advised the person asking to do the same. Why is that? The reason is that, if this person who brought down more of their household goods than those barking their directives has been on Facebook for any length of time, they will have seen that anyone who has given an answer to take more items would experience a pretty savage and public attack for their views.

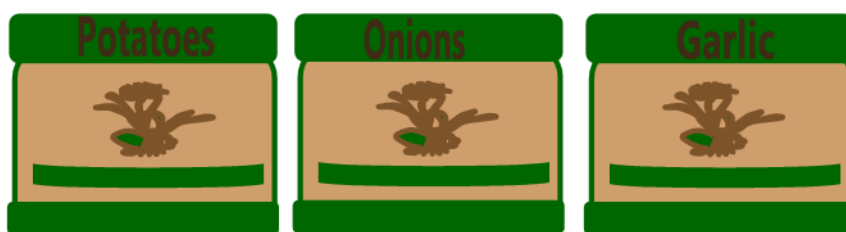
Then, after everything calms down, in a month or so, the cycle repeats, with another newbie asking the same question and pretty much the same Facebook veterans saying pretty much the same thing while others who don’t want to be attacked stay silent. You can almost feel the piranhas as they prepare to feed.

Of course, the decision as to what each person brings down or does not bring down is a personal one, having as much to do with how much emotional, sentimental and material comfort each person receives from their own items (many times accumulated over a lifetime of travel and hard work) as it does with how much each person has actually accumulated and how much budget each person has to bring it down. I would never give blanket advice on how much a complete stranger should bring down, so on the face of it, such advice is ridiculous for me to give to a stranger on Facebook, because I wouldn’t know anything about that person.

I can, however, make some observations.

- Mexicans like nice things, too. The odd assertion that if you live in Mexico, you should live like a poor Mexican is quite silly. Poor Mexicans don't want to live like poor Mexicans, so why should you? Any poor Mexicans I've ever met would like to live like rich Mexicans, or at least middle-class Mexicans.

Quick story. Several months after we moved here, we invited some new Mexican friends (a man and his wife) to our home. And before you get the wrong idea (because it's relevant to the story), please let me explain that these are Mexico-born Mexicans, not US-born Mexicans. They were both born and raised in Mexico, moved to the US as fully grown adults, and then, after the financial crash of 2008, as the man was telling us their story, they were forced to move back to Mexico.



When it came time for the man to relate to us the part of the story where he told us what items they brought

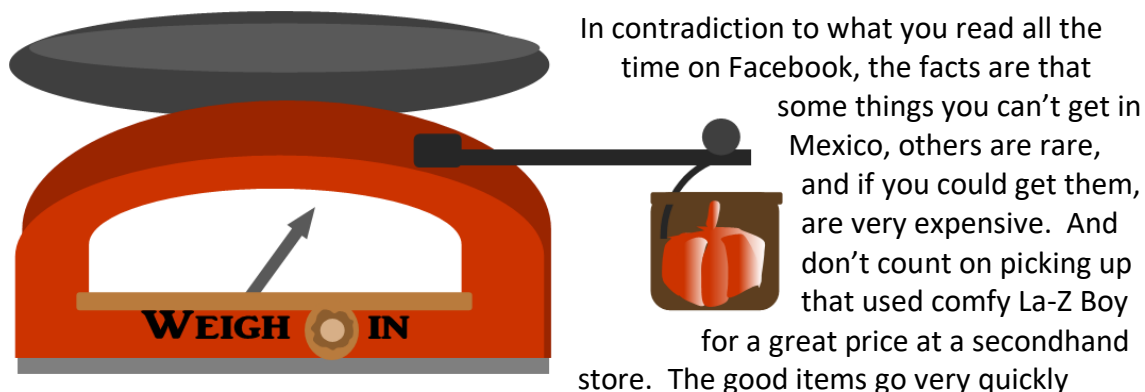
back, his speech became progressively slower and his voice progressively softer until, even with our heads bent forward, it was getting difficult to hear. Then, he looked down and away from his wife and other than some barely audible mumbling, pretty much stopped talking completely. After a short pause, his wife, in a voice that was quite strong, clear and easy to hear and understand said, "And he forced me to leave lots of my things in the US!" As the man continued to look down in shame, his wife shot him a look that would be described in Hawaii as "stink eye." You don't have to be Hawaiian to get the gist.

And they were visiting us in 2018, a full 10 years after the infamous event. It was the wound that would not heal.

Would you and your significant other be like our new friends in Mexico? I don't know. That would depend. However, to make the argument that bringing your good or cherished items to Mexico is somehow politically or culturally incorrect is a bit silly.

- No, Virginia, you cannot get everything you "need" here in Mexico. Of course, the full answer to this question revolves around what you "need." To take an extreme example to make the point, some people only "need" water, food and a medium-sized lean-to or they can live out of their 1965 Volkswagen van. I have been told that Mahatma Gandhi could fit all his worldly possessions in one shoe box. However, people more average than the random ascetic or a world-famous advocate of non-violent resistance to British colonial rule may like and appreciate more creature comforts. If you plan on being

happy in Mexico, you need to assess your “needs” without regard to what anybody else says you should need because in the end, their opinion about what you “need” isn’t important; only yours is.



(obvious reason: they’re hard to find here), and the ones that you may get to first, if you’re lucky enough to have that happen, are much more expensive than in the US.

Another Mexican friend we made here (once again, born in Mexico, lived in the US only as an adult and came back) told us that his similarly born Mexican wife forced him to bring their American-style couches and mattress she had become accustomed to when living in the US. Luckily for the health of his marriage, he complied, and was very happy to tell us about it, placing himself as the hero of the story, giving his wife what she “needed.”

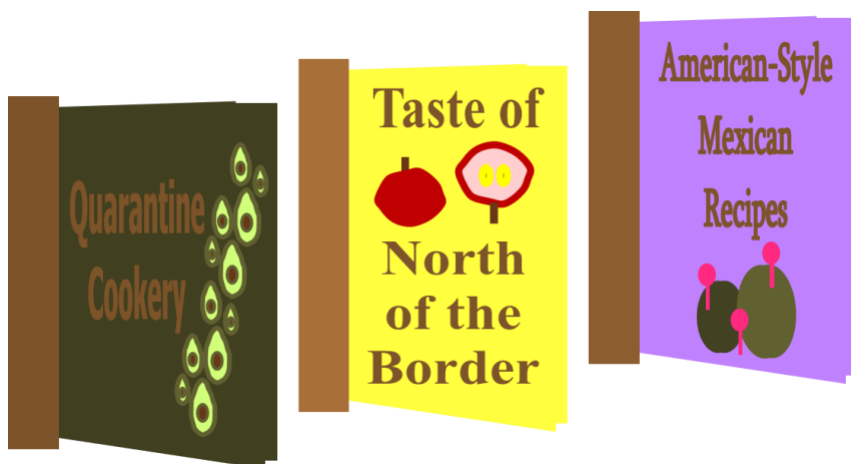
(For a sometimes humorous but informative look at what people cannot get but want in Mexico, click here: <https://bestmexicomovers.com/things-you-cant-get-in-mexico-and-should-bring-to-mexico/>)

Mexican furniture can and often is very beautiful, with hand carved pieces costing a mere fraction of what they would cost in the US. However, from the perspective of anyone who has lived in the US or Canada and plunked themselves down into a nice comfy NOB couch, Mexican furniture can also be quite uncomfortable. And as my wife Jet says, “You didn’t come to Mexico to suffer.”

From the perspective of someone who has slept on an American mattress, Mexican mattresses can also be quite uncomfortable. And don’t be fooled that they have the same brand names as in the US and Canada—regardless of brand name, mattresses in Mexico tend to be made for the Mexican market and Mexican sensibilities, which can be quite different than yours... or perhaps not. The point is, don’t take anyone’s word for it; try for yourself.

My wife also tells me that the baking dishes and other baking implements are a bit different (mostly, smaller) here in Mexico, so if you like to cook and /or bake and want to use your existing recipes, you should probably bring down what you use. It doesn't take up that much room, and you may not be able to replace them easily here.

- After they've moved, very few people wish they had brought less. Because we're in the moving business, people will often tell me how happy or not happy they are with the amount they brought. About 5% of the time, I hear from our clients that they wish they had brought less (or, more accurately, they wish that their spouse or partner had brought less). That leaves the other 95% who are happy with what they brought or regretted that they had not brought more.



Of course, all other things being equal, it will cost you less to move a smaller volume of your household goods than it would cost you to move a larger volume. However, before you too ruthlessly cull your possessions, inform your decision beforehand on how much you should get rid of by

having the actual costs of different scenarios of moving more or moving less. You may be surprised. Legitimate commercial companies such as Best Mexico Movers have certain minimum costs for expenses such as insurance, compliance with regulations, certified drivers, etc., that don't change if you bring one box or 500 boxes. For example, if you bring twice as much volume, your cost will not be anywhere near twice as many dollars. I urge you to find out early in the process, so you will know exactly how much to give away and you won't have needless regrets.

I close this section with some observations from my wife, Jet. You may not be like Jet and you may disagree with Jet, but I know that Jet speaks for many people. How do I know? People tell her. When she writes something on the topic of how much to bring, she gets comments all the time such as "I'm with Jet!" and "I'm so happy you wrote what you did. You're just like me."

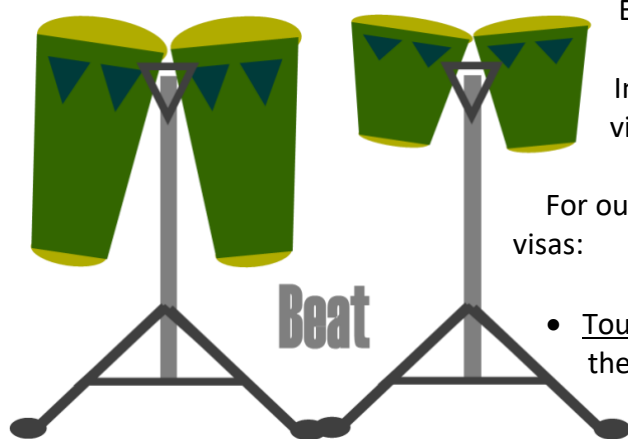
Jet says, "You worked all your life to surround yourself with the things you cherish and love, and you did not come to Mexico in order to give them all up and live like a monk."

Or, because I don't know you, perhaps you did come to Mexico to live like a monk. The point is, it is your decision, so don't be bullied.



- ☐ Personally try Mexican beds and furniture for comfort and decide how important it is to you to have your own.
- ☐ Determine the most amount of items you would consider taking with you to Mexico.
- ☐ Determine the least amount of items you would consider taking with you to Mexico.
- ☐ Get prices for the most and the least amount of items you would consider taking with you to Mexico and for the amounts in between.
- ☐ Without being bullied or using anyone else's values but your own, determine the right amount for you to take with you to Mexico.
- ☐ Get rid of everything else, either by selling it or giving it away and have no regrets.

Get or Prepare to Get Your Residency Visa *



Everyone entering Mexico should do so legally.

In order to enter Mexico legally, you will need a visa.

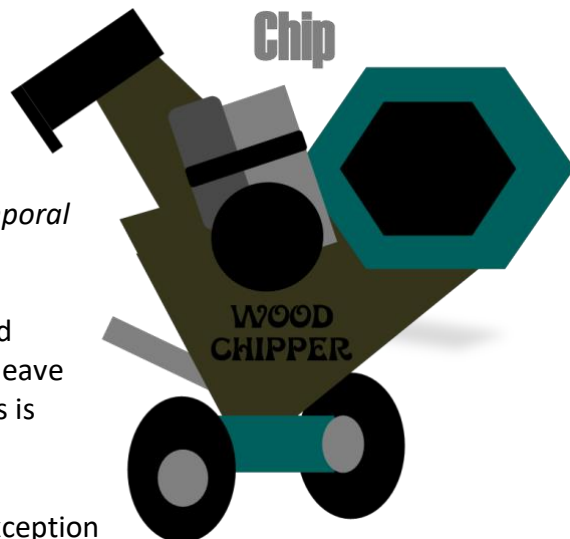
For our purposes, there are three different types of visas:

- Tourist. A Tourist Visa is the kind they give you at the airport or at the border when you go on vacation in Mexico. Generally, they are valid for 180 days, after which you either have to renew your visa or no longer be in Mexico.
- Temporal or Permanente. In order to be granted a *Temporal* or *Permanente* visa, you must begin your process at a Mexican consulate outside of Mexico (for our purposes, generally in the US or Canada). As with so many other issues in Mexico, there are laws

about who can and cannot qualify, and each consulate and even each employee at each consulate may do it slightly differently. In general, you must provide enough documentation to prove that you have a good reason to be in Mexico for an extended period of time, you're not a criminal, and that are able to support yourself financially.

If you are accepted for the first phase of obtaining your *Temporal* or *Permanente* visa at the Mexican consulate in your home country, they will place a stamp in your passport. From this time, you will have six months in order to start the second phase of obtaining your *Temporal* or *Permanente*, which will take place in Mexico at an immigration office (IMN). Once you receive your stamp and you cross into Mexico, immediately go to Immigration in Mexico at the border or airport (not your final home) and tell them you have the stamp. When you do this, they will have you fill out some forms, which will put you into the system. If you don't do this at the border or at the airport, you'll have to go back later and do it, so please don't forget, even if they don't ask you or remind you, because there's a 90%+ chance they won't.

Once you receive your stamp, cross into Mexico and you're put into the system in Mexico, you then have 30 days in which to begin the second part of receiving your *Temporal* or *Permanente*, which will take place at the immigration office near your new home in Mexico. And, once you have your stamp and cross into Mexico, you are not supposed to leave Mexico until the second part of your process is complete. Some immigration offices make exceptions, but these exceptions must be in writing and you generally can't ask for an exception after the fact.

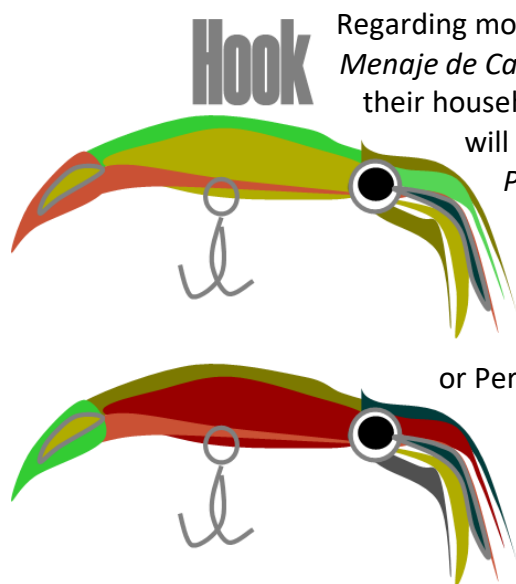


Once you begin the second part of the process at IMN near your home in Mexico, it usually takes from three to six weeks to receive your light green plastic card, which will signify that your process of obtaining your residency visa is complete, will make you very happy and relieve you from the requirement of having to carry your passport everywhere. At a high level, it's really that simple.

For our purposes, there are few differences between the *Temporal* and *Permanente* visa:

- The *Temporal* is good for one year and then renewed in Mexico for three more years, after which you need to get a *Permanente* or start over, while the *Permanente* is... well... permanent.

- There are slightly more stringent financial and other requirements for the *Permanente* as opposed to the *Temporal*.
- If you have a *Temporal*, you can drive a foreign-plated car in Mexico, whereas if you have a *Permanente*, in most places in Mexico, you cannot. (If you're thinking of driving your US- or Canadian-plated car in Mexico, please read that again.)
- When you sell real estate in Mexico, there are certain tax advantages to be a *Permanente*.



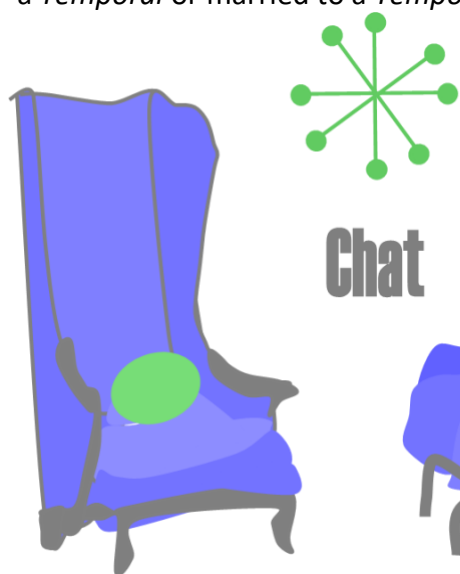
Regarding moving your household items to Mexico on a *Menaje de Casa* (which is pretty much how everyone moves their household goods to Mexico and is described later), you will have to have at least started your *Temporal* or *Permanente*. If you started your visa process and then voided it by going in and out of Mexico, then you can't use the *Menaje de Casa*.

- ☐ Determine if you would prefer a *Temporal* or *Permanente* visa.
- ☐ Find out from the consulate nearest your home NOB what are the requirements and what you need to bring to get a *Temporal* or *Permanente* visa. (Sometimes, it's on their website, but most of the time, it's not accurate or up to date.)
- ☐ Make your appointment well in advance of you needing your visa. (You will probably have to come back more than once.)
- ☐ During your appointment, if you will need to get your *Menaje de Casa* certified, talk with the person who does it, make sure you understand his or her exact requirements, and make an appointment with that person to present your inventory for certification well in advance of you needing it to be completed. (Reason: you may not have done it right.)
- ☐ Get your stamp in your passport.
- ☐ When you enter Mexico at the border or at the airport with your stamp, notify the immigration officer so they can put you in the system.

- ☐ Within six months of getting your stamp or thirty days after crossing the border (whichever is less), begin the second part of getting your visa in Mexico by visiting the immigration office near your home in Mexico.
- ☐ Do not leave Mexico without permission until the process of getting your *Temporal* or *Permanente* visa is complete which you will know has happened when you get your light green plastic card.

Foreign Plated Cars in Mexico *

For most areas in Mexico, if you plan on driving your foreign-plated car in Mexico, you must be a *Temporal* or married to a *Temporal* who owns the car.



In order to have your foreign-plated car legally in Mexico, you will need to have it be legal in every way in your country of origin (i.e., the US or Canada), and receive a *permiso*, or TIP. You can get your *permiso* on-line; at some limited places in the US and Canada (usually across the hall from the Mexican consulate); or you can get one immediately upon crossing the border into Mexico.

The *permiso* will cost you several hundred dollars, which is used as a deposit against you selling your foreign-plated car in Mexico, which is not legal to do. If you follow all the rules, you can get your deposit back upon driving your car out of Mexico, but this can sometimes be a bit problematic.

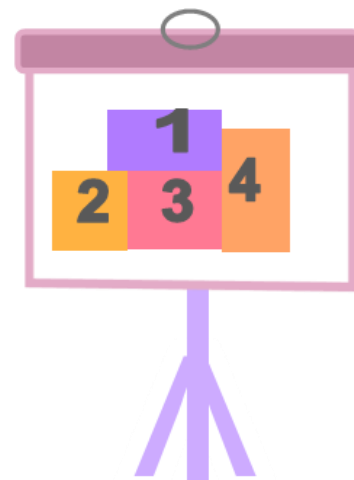
Your *permiso* is tied to your visa, so when your *Temporal* expires, so does your *permiso*. If you drive your foreign-plated car in Mexico without a *permiso*, your car is in Mexico illegally, and can be confiscated. In other words, don't do it.

- ☐ Make sure your car is completely legal in the US, including being up to date on paying your registration.
- ☐ After getting your visa started in the US or Canada, if you can, get the TIP for your vehicle at a Banjercito in the US or online.

- ❑ If you don't get your TIP for your vehicle prior to crossing the border, that's OK. Just go to the proper Banjercito at the border. (There is a list of them online.)

An Insider's Tip on Car Registration *

After you've been in Mexico for a while, you'll notice that a lot of foreign-plated cars are from South Dakota. For those not "in the know", this can be a bit puzzling, because with a ranking of 47 out of 50 US states in population, it does seem a bit odd that so many people from South Dakota have moved to Mexico.



The answer, of course, is that they have not. I would doubt that even a small percentage of those driving with South Dakota plates have ever even been to South Dakota.

Then what's the reason for all those South Dakota license plates? There are three of them:

1. The cost of car registration in South Dakota is less expensive than most other states.
2. South Dakota does not require emissions testing. This would be important to you if your car's existing license plates were from a state or area that required emissions testing on some time-based interval. If this applies to you, then in order to comply with your state's requirements to license your car, you would have to drive back every so often and get it tested. Registering your car in South Dakota avoids that.
3. The government of South Dakota is happy to do it, knowing full well your situation. Just call the Clay Country Treasurer.

- ❑ If you would rather have your car registration be from South Dakota, contact the South Dakota Clay County Treasurer in more than enough time to have them ship you your new plates while you're NOB. (They won't ship your plates or stickers to Mexico.)

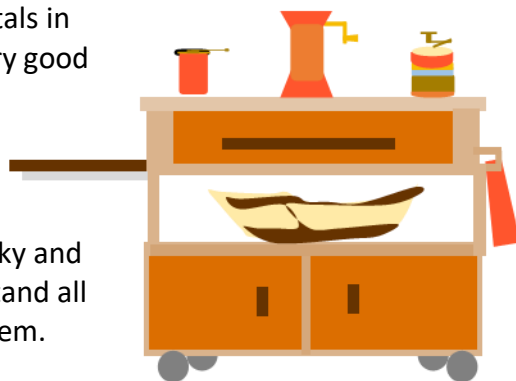
Car Insurance and Health Insurance

Your NOB car insurance will not cover you in Mexico, so if you drive in anything other than a rental car in Mexico, you will need to get Mexican car insurance. (When you rent a car in Mexico, typically insurance is included, but make sure to ask.

Contact an agent for Mexican automobile insurance well in advance of your need, so you can feel comfortable with your agent and your policy. Whether or not you will need US car insurance when driving in the US or Canadian car insurance when driving in Canada is a complicated question, so please make sure you understand all implications before you cancel any NOB car insurance.

I'm not aware how health insurance works in the different provinces in Canada, so I won't comment on health insurance coverage for Canadians in Mexico. However, if you're a US citizen and come to live in Mexico, you should have Mexican health care coverage. There are some very good policies at much lower rates than in the US (huge understatement) that will cover you in very good hospitals in Mexico and, if you travel to the US, will cover you in very good hospitals in the US until you are stable enough to be transferred to Mexico.

Bring Your Creativity



Whether or not you should cancel your US health insurance, especially if you have Medicare, is a very tricky and complicated question, so please make sure you understand all the implications of your actions well before you take them.

- ☐ If you will drive a US- or Canadian-plated car in Mexico, get Mexican car insurance from a reputable agent.
- ☐ Get some form of Mexican health insurance, whether full coverage, medical evacuation or something else you're comfortable with.

Legal / Mailing Address

There is a very good chance that you will need to maintain a "legal address" in the US or Canada for all sorts of things, including for credit cards, ATM cards, and banking institutions. You could use your sister-in-law's, or your good friend's, or one of the mail forwarding companies.

Please be aware that there are many US financial and other institutions that will not accept a permanent address outside the US and if they find that you do live outside the US, may even cancel your account. (Most people just give them another US address.)

- ☐ Decide what will be your legal US or Canadian address.

- ☐ If you need to, choose a service that will accept your mail NOB, scan it, and hold or forward whatever you need.

Money

You will be living in Mexico, so you should have at least some pesos in your wallet when you arrive. If you let most NOB banks know well enough in advance, most will exchange your dollars for you so you can have those pesos in your wallet well before you enter Mexico.

- ☐ Get more Mexican pesos than you think you'll need for tolls and unexpected expenses (see below) from your bank and have your pesos ready to go.

If You're Driving, Prepare for the Toll Roads and a Cash Economy

Bring Your Dreams



If you're driving to Mexico, you will almost certainly want to take the *cuotas*, or toll roads. Toll roads charge tolls, which, by Mexican standards, can be substantial. Please have lots of those pesos you got ahead of time ready. You may also want to have pesos for emergencies such as paying the mechanic to fix the tire that just blew out or an unexpected stay at a hotel that doesn't accept credit cards. It's always good to have pesos with you in Mexico.

Taking Your Pets with You

Just like there are rules for how people can legally enter Mexico, there are also rules for dogs and cats. (The rules for animals other than dogs and cats can be different.)

In order for you to bring your dog or cat to Mexico, you will need to prove that Fido or Samantha is in good health and up to date on their rabies vaccines. Here's the link to the form many people use:

<https://www.aphis.usda.gov/library/forms/pdf/APHIS7001.pdf>. You'll see that you will need a certified veterinarian to sign the form. Getting this done NOB can be pretty pricey, but that's the right way to go. (You can save big time on vet bills later, after you live in Mexico.)

When getting Spot's or Tiger's shots, please make sure to have a calendar available. Just like you can't wait too long to get the shots, you can't do them too far in advance, either.

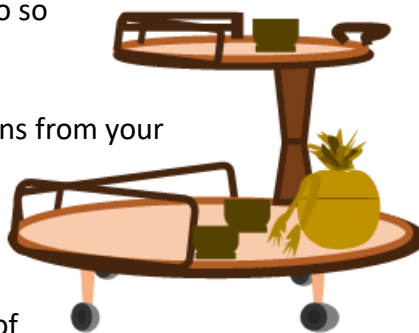
Entering into Mexico with your dog or cat is easiest by car. Most of the time, the Mexican authorities at the border don't even check. Then, you just have to find pet friendly hotels and motels for along the way. Fortunately, there are quite a few; just check ahead of time.

If you travel by air, the situation is much more complicated. Some airlines won't allow you to bring a pet at all; some will only allow certain breeds or certain sizes; and, if your pet is too large to go with you or is not allowed in the people section of the plane, there are regulations and common sense concerns you have to be aware of regarding how hot it will be in the cargo area of the plane. When traveling by air, please be prepared to have the Mexican officials check your pet after you land, because they almost certainly will.

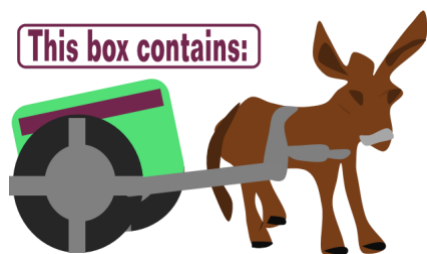
Several of our clients who travel by air won't risk putting Mr. Barkley in the plane's cargo area and instead, contract with someone to meet them at the border and drive their dog (and many times, our clients) to their new home in Mexico. If you're in this situation, let me know and I can refer you.

- ☐ Find a vet in your neighborhood NOB who is certified to give the shots and make the declarations for your pets.
- ☐ Tell your vet when you plan to cross into Mexico so he or she can time the shots correctly.
- ☐ If you are traveling by air, find out the regulations from your airline. See if you can take your pet with you in the passenger area. Tell them your pet's breed, weight, etc., and if your pet cannot come with you in the passenger area, ask them if there are any restrictions regarding the time of year because of excess heat or other concerns.
- ☐ If you are flying and you aren't comfortable having your pet(s) in the cargo area of the plane, make arrangements well in advance to have someone drive your pets in Mexico.

Bring Your Good Cheer

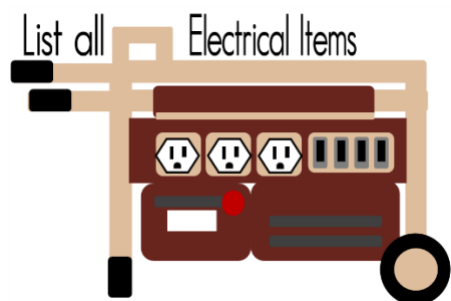


* Please see the chapter *What You Can Believe*.



The *Menaje de Casa* and Your Inventory

The *Menaje de Casa* is the way in which the Mexican government allows Mexican nationals and foreigners with a *Residente Temporal* or *Residente Permanente* to bring their used household goods into Mexico one time without paying an import tax. By “used” they generally mean that your household goods have to have been in general household use (not commercial) for six months or longer.



As part of the process of using the *Menaje de Casa*, you or your moving company will submit an inventory in Spanish. Your inventory will need to list the make, model, and serial number of any item that is electric (generally speaking, anything with a cord or a battery), as well as other powered items like gas-powered weed whackers.

If you are a Mexican national, you will need to get your *Menaje de Casa* inventory certified at a Mexican consulate. Whether or not *extranjeros* (non-Mexican nationals; probably you) will need to get their *Menaje de Casa* certified at the Mexican consulate will depend on many factors which tend to change, so you need to check with your commercial mover.

If you do need to get your inventory certified, even though all consulates will require your inventory to be in Spanish, each consulate and each consulate employee may have different requirements or opinions as regards proper format and other issues. Because of this and the time pressures that may be attendant when you can’t create your inventory until your household goods are placed on the truck and already heading to the border, we strongly recommend that if you need to get your *Menaje* inventory certified, you visit your consulate ahead of time and ask them for a format that would be acceptable to them, along with any other documents they may require. (For our clients, we create a sample *Menaje de Casa* inventory for them to take to the consulate and ask if it is OK “as is.”) Then, we recommend that you

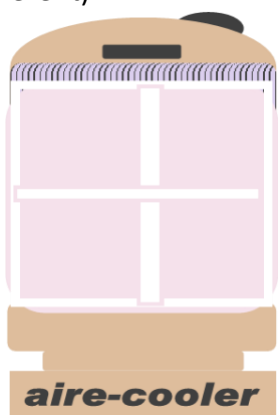


make your appointment at that moment with that consulate employee for when you will come back to present your inventory.

Generally speaking, a legitimate commercial mover will submit your inventory along with other documents he or she will ask you for to the proper Mexican authorities before your move and during your move.

How your inventory is done and even if you can do it yourself will also depend on the type of insurance you choose, so please check with your mover before you start any inventory or any packing. In addition to being utilized for customs and insurance purposes, your inventory should also be used as a check to make sure your items get on the truck and get off the truck.

Here is the list we provide to our clients with what they cannot bring on their *Menaje de Casa* (the list for what you cannot bring when going back to the US and / or Canada is only slightly different):



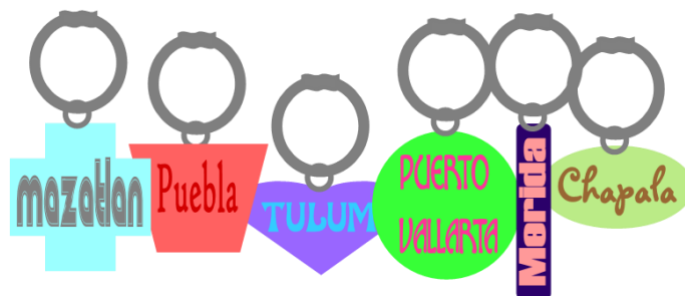
- Any item that is otherwise acceptable on a *Menaje* but that you have not had in use for at least six months.
- Any item that is locked.
- Items that are smaller and extremely valuable such as jewelry, coins, collectables of all types, should be brought to Mexico by you separately, as opposed to being included on this *Menaje*.
- A quantity large enough of any item so that the items could be considered sufficient to start even a very small business or to sell. This includes hobby or craft items.
- Anything that can catch or start a fire. (Examples, but not a complete list: gas cans, propane, butane, lighter fluid, matches, motor oil, candles, etc.)
- Living plants and seeds.
- Archeological items such as fossils.
- Cleaning supplies.
- Toiletries and grooming supplies. (Examples, but not a complete list: perfumes, mouthwash, toothpaste, etc.)
- Food. (This includes any food, including food in cans and bags, liquids, powder, fruits, vegetables, and pet food. Spices are considered food, as are cooking oils, none of which is allowed in a *Menaje*.)

- Any type of weapon, including bows and arrows, explosives, knives, swords, machetes, arrows, guns and rifles of any sort and even supplies and accessories, such as ammunition, even empty cartridges, holsters, cleaning equipment, pellet guns and accessories.
- Pornography of any type and in any form.
- Medications, supplements, and vitamins, including even items over-the-counter items like aspirin.
- Insecticides.
- Alcohol of any kind, including beer and wine.
- Cloth or fabrics in bulk.
- Taxidermy items (stuffed formerly alive animals).



- Scientific instruments or tools.
- Batteries other than for items such as for your remote controls, etc.
- Vehicle parts.
- Construction materials such as tiles, doors, windows, etc.

If you have any doubt whatsoever on what you can and cannot bring, always ask your commercial mover.



Deciding Whether You Need a Commercial Mover and How to Proceed Without One

Lots of people don't need a commercial mover; whether it's Best Mexico Movers or any other legitimate commercial mover.

Sometimes, a legitimate commercial mover may just have to charge more than you are willing to pay for the amount of household goods you have or their importance to you. Any legitimate commercial mover (not "a guy with a truck" or someone who does it part time) has fixed costs that don't change much depending on the volume of household goods you bring. Costs that your legitimate commercial mover pays, either directly or through their network include:

- Compliance with all the laws and regulations in at least two countries.
- Insurance.
- Hiring drivers who legally can transport household goods in at least two countries.



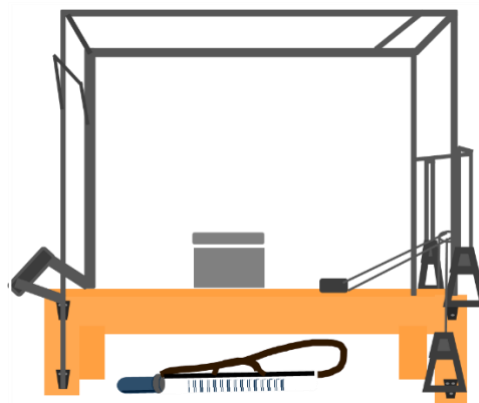
- Hiring quality and qualified personnel to handle your household goods.
- Paying the customs broker to make submissions and clear your goods.
- Managing the business to be as efficient as possible and (very importantly) for when things don't go according to plan.

Whether your shipment is one box or 500 boxes, these base costs don't change much. (One of the very few ways in which a legitimate mover can cut costs is to have your household goods transferred from trailer to trailer and warehouse to warehouse in the US and in Mexico multiple times so they can load your goods with other household goods on the same truck.

Even though this is an extremely common practice among long-established movers, we don't believe is good for our clients, so we don't do it.)

Of course, you are the only one who can determine the value of moving your household goods. Sometimes, though, the amount someone calling me wants to move is so small and the move is so challenging that I tell them that it may not be worth the money a legitimate commercial mover would have to charge, and I recommend other alternatives.

So, first, get a quote. Then, you can decide from the real numbers.



If you decide that the cost isn't worth it, how can you get your household goods to your new home in Mexico without a commercial mover like Best Mexico Movers? One very good way is to drive it yourself. If you have a *Temporal* residency permit and you get a *permiso* for your car (see the section *Foreign Plated Cars in Mexico*, in the chapter *What to do Before Your Move*) you are allowed to drive your foreign-plated car into Mexico. Just pack and load your items and go.



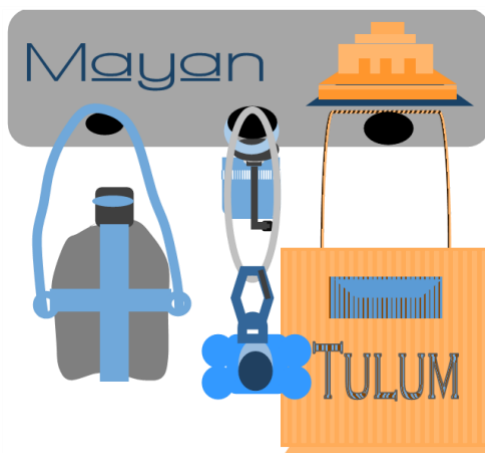
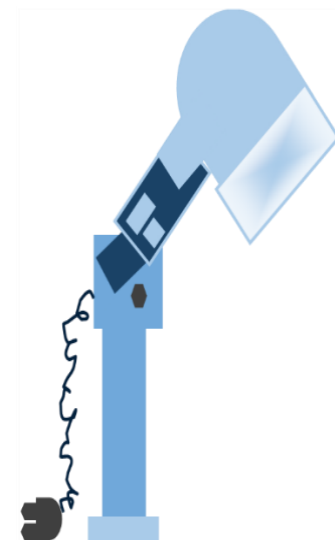
When I recommend this, the next question is almost always, "What will happen at the border?" I'm sorry that the unsatisfying but true answer is, "It depends." As mentioned above, laws and regulations are not uniformly enforced in Mexico and the border is certainly no exception. Most but not all people will tell you that you do not need a customs broker if you are importing a relatively small amount of your own used household goods. Some people will tell you that you need to make an inventory, while others will tell you that you can get by without one. Most people will tell you that you do not need to get a certified *Menaje de Casa* while others will say you do.

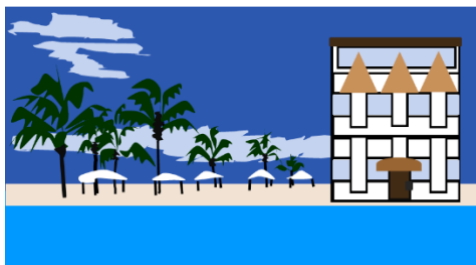
My advice will depend on the attitude and confidence level of the people with whom I'm speaking, but for most people (maybe this applies to you and maybe it doesn't), if they have a small amount of household goods (like will fit in your car or small van), I tell people to try to cross and see what happens. There is a good chance the customs officials may ask you a few questions and just wave at you or they may ask you for some import fees or other fees or maybe they won't. For people who have a small amount to move, this can be the best alternative.

If you don't want to do this yourself, I know of people in Mexico who will meet you at the border or even in your town in the US and either drive your car or perhaps drive another one to your home in Mexico with your small amount of household goods. While not strictly in compliance or legal, as long as the amount of your household goods is small enough to fit into a non-commercial vehicle, and as long as you are 100% certain who you are dealing with, this seems to work fairly well for most people. If you are not 100% certain who you are dealing with, I would not advise this.

Another alternative I've suggested to people who are flying is to pay the extra luggage fees and have the airline transport their goods. The cost may seem like the airline is perpetrating highway robbery, but it may be less than having a commercial mover move you.

I have heard very mixed reviews from people who tried to send their items via companies like FedEx or DHL. For some reason, this quite often appears to be a problem.





Choosing a Mover

As mentioned in the previous chapter, not everyone needs a commercial mover. If you decide that you do need a commercial mover, before choosing one, you need to first find out if the company or person you're considering moving your precious household goods is actually a legitimate commercial mover at all, or just "a guy with a truck."

First, let's deal with a few possibilities of what could go wrong with moving your treasured household goods to Mexico via a "guy with a truck" (referred to below as "The Guy" or "your Guy", etc.)

- The moving of household goods in the US and Canada is highly regulated by, among others, the Department of Transportation (DOT); not only the national DOT but state ones as well. If the DOT finds out that your mover is not in compliance with DOT regulations, he or she is subject to fines so large that The Guy could be put out of business, right in the middle of your move.
- There are also regulations in Mexico regarding legally moving household goods within Mexico. If your Guy is stopped, he could get his truck confiscated or held for a very long time, right along with your household goods that are loaded inside the trailer.
- Commercial drivers in the US, Canada and Mexico have to meet strict requirements. If they don't, they could be fined. Not just anyone is allowed to drive a commercial vehicle transporting household goods in either country.
- Most Guys With Trucks don't or can't offer you the ability to insure your precious household goods with an independent, reputable, third-party insurance company. Asking if they can is one of the best ways for you to know if you're dealing with a reputable person—ask The Guy you're considering who they offer to you to insure your household goods. If you're met with a rambling answer or "you don't need it," you will



know what you need to know. If something gets lost or stolen or damaged (definitely not unheard of during international moves, even with the most reputable companies), you will have to deal directly with The Guy to get your items back, replaced, or fixed, and you would have to do so in Mexico, most of the time with no contract or a flimsy one. Good luck with that.



- There is a very specific way in which household goods legally clear customs and are brought into Mexico. Legitimate commercial movers use legitimate customs brokers for this task, who charge a legitimate amount for their services. I have heard of other “companies” who will offer to move household goods into Mexico who have “a friend” at the border who will let them cross or not cross too often, etc. What could go wrong?

You may say that there is a pretty good chance that none of these compliance, customs clearance, loss or damage issues would happen, and I would suspect that much of the time, other than the loss or damage, they don't. However, I do know that they do happen.

How do I know?

Because I get calls from people whose household goods are in some type of limbo as a result of their Guy getting caught or items lost or broken, asking if we can help. Of course, we can't.



Other Guys with Trucks have otherwise legitimate businesses doing some other business and move people from time to time as a sideline. Perhaps they have a bakery, car rental or furniture business. They may or may not be in full compliance, so you may or may not have that issue; and they may or may not offer some type of insurance that you should definitely verify. However, please keep in mind that these other Guys don't move people full time, so they are much more likely to make innocent or other mistakes and miscalculations, and if something goes wrong, they can more easily abandon their sideline moving business and just return to their main business.

If you do a web search and find recommendations for the referred Guy with a Truck, you'll find something curious: if the article or recommendation is more than a year or so old, most of the time, you won't be able to be able to locate or talk to the person or “company” mentioned... anywhere. Very rarely are these Guys continuously in the moving business for any length of time. I wonder what could have happened.

In the end, it's like musical chairs. Most of the time, when the music stops, you find a chair. And sometimes, you don't.

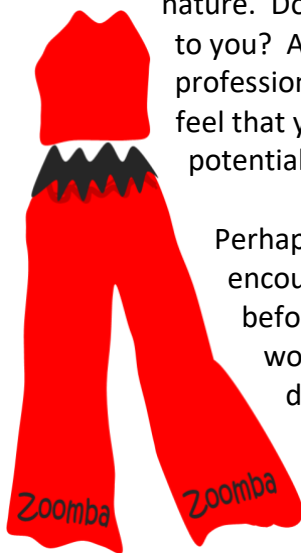


OK, so if you've got too much to move yourself or figure another way to do it, you're convinced that you need a legitimate commercial mover who is in full compliance with the rules and regulations in all countries in which it operates, offers third party insurance from a reputable insurance company, who uses a licensed commercial broker to legally import your household goods and whose only business is moving people's household goods, how do you choose from among them?

Obviously, you want the best value for your money and the best way to get that is to:

- i) get referrals;
- ii) find out what you can about the mover's reputation;
- iii) compare prices and understand how each mover may do your move differently than the others (especially ask about transloads and consolidations); and,
- iv) consider how the mover treats you during the time before he or she has any of your money.

Why is this last item important? Because your mover probably won't treat you better after they have your money than they treated you before they had your money. It's just human nature. Do they return your calls promptly? Are they available? Did they listen to you? Are they explaining the process in a way that you understand? Are they professional? If something goes wrong, how are they likely to react? Do you feel that you could work with them during one of the more important and potentially stressful events of your life?

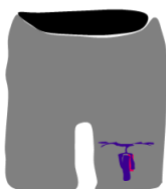


Perhaps Jet and I were naïve, but one of the biggest surprises we encountered when we originally investigated our own move to Mexico before we started our business was that all the companies we contacted would move our household goods from one truck to another, into several different warehouses, and then combine our household goods with their other customers' household goods. (The industry terms for this are "transloading" and "consolidation.") And even worse, from the time our household goods would be picked up in the US, transloading and consolidation would happen perhaps five or so

times, both in the US and in Mexico. It wasn't easy to get this information out of the moving companies we contacted; we had to squeeze it out of them.



Once I knew that this was the process, it wasn't difficult for me to imagine our household goods in a warehouse mixed with other people's in various places, in two countries, etc., with lots of people who don't work for the moving company having access to it. If something were damaged or went missing, no one could even tell me with certainty when or where it happened.

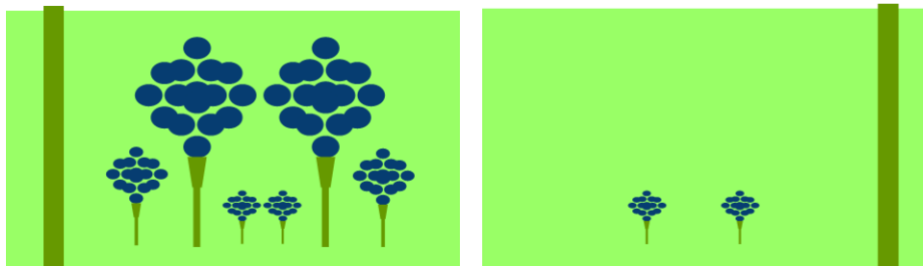


What could go wrong?

When I told my wife Jet that her cherished household goods would be moved around and combined with others' like I just described, both in the US and in Mexico, she said simply, "We're not doing that." As a result of those simply stated four words, I had to start Best Mexico Movers, first, for our own move, and later, for our clients'. (We keep transloads to a minimum—usually one or zero, and we do not consolidate at all.)

By the way, if you would like to know if the company you're considering will store your items in a warehouse, move it several times from truck to warehouse to truck and combine your household goods on the same truck as others' household goods, just ask them for the exact date when your household goods will arrive in at your new home in Mexico. If they give you a range of more than a few days, you'll know why: they plan on storing your household goods in their warehouse while they wait for other customer's household goods to load onto the truck with yours.

Here's a chart we put together to help people to understand the criteria they should consider before choosing a mover. We offer it on the next few pages, whether you choose us or not.



Comparison Chart for Mexico Moving Companies

Created to help you to organize your decision on choosing the best moving company for your needs.

	Company A	Company B	Best Mexico Movers	Your Notes
Does the company demonstrate that they understand and care about my unique situation and construct my move around my needs, my concerns, and my budget, rather than their needs and "one size fits all?"	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sort of	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sort of	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sort of	
Am I 100% clear on what I need to do and not do and when? Do I understand everything the company sent me, including the contract?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sort of	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sort of	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sort of	
Is this company or individual operating legally in each country and at the border or is it "just a bunch of guys with a truck or a trailer?" For example, do they comply with all US Department of Transportation rules for each state in which they operate, or do they risk big fines and potential confiscation if they get caught at the border or elsewhere? Are your household goods even insured? (For more on this very important question, click here .)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't know	
Is my quote based on weight or cubic feet? For example, can I be forced to pay more money than I was told in my original quote even after my goods are not in my possession (let's say, for example, when my goods are at a warehouse in Texas) based on weight, which I have no way of estimating or knowing by myself?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sort of	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sort of	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sort of	

	Company A	Company B	Best Mexico Movers	Your Notes
Can I be forced to pay more money than I was told in my original quote when my goods are delivered, based on factors such as the truck not being able to reach my address, stairs, long walks, etc.?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sort of	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sort of	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sort of	
Who packs my household goods at my original home?	<input type="checkbox"/> Me <input type="checkbox"/> 3 rd party Company chooses <input type="checkbox"/> 3 rd party I choose	<input type="checkbox"/> Me <input type="checkbox"/> 3 rd party Company chooses <input type="checkbox"/> 3 rd party I choose	<input type="checkbox"/> Me <input type="checkbox"/> 3 rd party Company chooses <input type="checkbox"/> 3 rd party I choose	
Who loads my household goods onto the truck at my original home?	<input type="checkbox"/> Me <input type="checkbox"/> 3 rd party Company chooses <input type="checkbox"/> 3 rd party I choose	<input type="checkbox"/> Me <input type="checkbox"/> 3 rd party Company chooses <input type="checkbox"/> 3 rd party I choose	<input type="checkbox"/> Me <input type="checkbox"/> 3 rd party Company chooses <input type="checkbox"/> 3 rd party I choose	
Does the company assign me my own contact person who will guide me through the entire process, from preparing for the move, to answering my questions, to potentially being with me at my original home, through final unloading and unpacking?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sort of	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sort of	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Sort of	
Who helps me over the phone or potentially in person at my original home to create the inventory and make sure everything is packed and loaded correctly?	<input type="checkbox"/> Company <input type="checkbox"/> No one	<input type="checkbox"/> Company <input type="checkbox"/> No one	<input type="checkbox"/> Company <input type="checkbox"/> No one	
Do my household goods share a trailer with other people's household goods at any time?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	
Are my household goods off-loaded into a warehouse at any time?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	
Are my household goods transferred into another trailer to cross the border into Mexico or the US?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	
Does the company use an authorized customs broker to clear my household goods at the border, or do they just "wing it" and hope nothing happens?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	
Does the truck in Mexico drive on toll roads (safer and smoother) or non-toll roads (which are much worse and more likely to create damage)?	<input type="checkbox"/> Toll roads <input type="checkbox"/> Not toll roads	<input type="checkbox"/> Toll roads <input type="checkbox"/> Not toll roads	<input type="checkbox"/> Toll roads <input type="checkbox"/> Not toll roads	

	Company A	Company B	Best Mexico Movers	Your Notes
Are my household goods transferred into a warehouse near my new home?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	
Are my household goods loaded into yet another trailer for delivery to my new home?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Not sure	
Cost	\$	\$	\$	

Write your additional notes here:

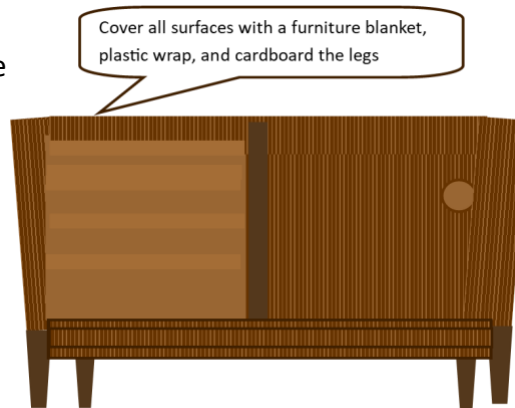


Packing and Loading

“Packing” includes putting your items into boxes and wrapping and protecting your furniture and other items, while “loading” refers to placing your items into the truck, trailer, or container.

Depending on insurance coverage and other issues, in some circumstances, we allow our clients to do some or all of their own packing and loading. Other clients of ours use professional packers and loaders. Whichever you choose, please understand that there is no more important aspect to the overall success of your move than high quality packing and loading.

If you do it yourself, whether you use a commercial mover or not, please follow the tips below. If you hire someone else to do it, you always want to watch them, regardless of whether they represent a huge company with a household name, or someone who just started a business in your small town. They are handling your cherished household goods, and one way or another, you’re paying to have your household goods safely packed and loaded. You are entitled to only the best.



Make sure that your inventory is accurate and complete and that you or someone you supervise uses your inventory to make sure that everything on your inventory gets onto the

truck. Then, you or someone you trust should use that same inventory to make sure that everything that you know got onto the truck is delivered to your new home in Mexico.

If you work with us, we help with this or we just do it for you, but if you choose someone else or do it yourself, you may benefit from our experience by using our list of best packing and loading practices below.

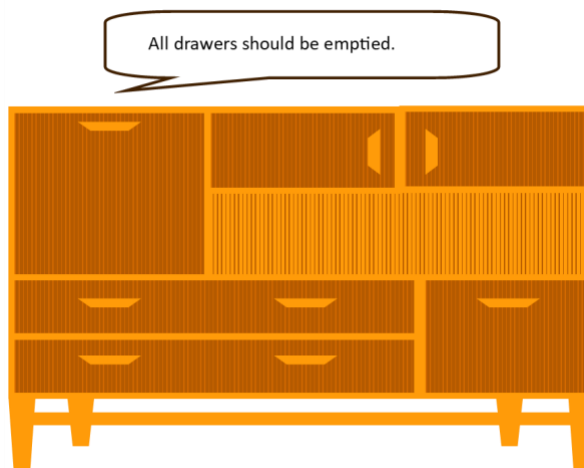


Packing:

To work with your packers and loaders:

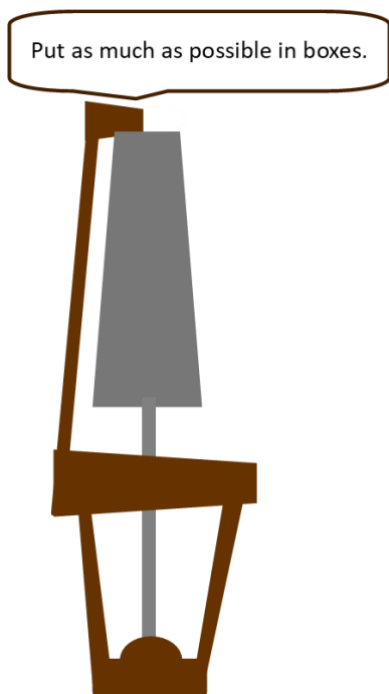
- ☐ Doublecheck that you don't have any items not allowed on your *Menaje de Casa* and that everything is labeled correctly and listed correctly on your inventory both you and they will sign.
- ☐ Make sure you or they pack and protect furniture and other items very carefully. In a transload (if any), the warehouse personnel move your items from one truck to another, but they won't re-wrap them, so you or your packers must protect your items when they are packed and loaded at your old home as though they are going all the way to your new home.
- ☐ Make sure you or they use several furniture blankets around furniture, especially around the corners, where items can rub against other items. Make sure you or they hold down the furniture blankets with tape, so that they don't fall off. Then, you or they should wrap the entire item in plastic wrap in order to further guard against the blankets slipping and to protect any parts aren't otherwise protected with the furniture blankets. Whenever possible, you or they should remove legs of furniture.
- ☐ Legs on tables are very prone to break. If you or they can't remove the legs, try to place tables upside down or sideways. Do not place heavy boxes on top of tables with legs on them.
- ☐ All drawers should be emptied.
- ☐ Dishes and mirrors need to be packed vertically.
- ☐ When packing a box, they or you should put lots of crumpled paper i) on the bottom; ii) on all sides; and, iii) on the top. Crumpled paper acts as a shock absorber. Then, use lots of crumpled paper to wrap all the items that go into the box.

- If your items will be in storage for any appreciable length of time, do not allow anyone to put plastic wrap directly on leather, because doing so can cause damage. Instead, place blankets first on leather, then plastic wrap over the blankets.



- You or they should put as much as possible in boxes (as opposed to not putting items into boxes), including vases, statutes, lamps, lampshades, bicycles, artwork, and even pillows and blankets. Boxing (even if it is necessary to create one larger box out of two smaller ones) helps to protect your items and makes for better loading so items don't bump against each other.

- You or they should pack boxes fully, with no voids, so the boxes don't get crushed by other boxes items on top of them. If you or they do otherwise, when the trailer starts to move, the boxes will crush and become uneven, thereby falling or banging into each other. At the same time, don't pack boxes more than fully, because the bow at the top, bottom, or sides, will cause other stacks of boxes to become unstable.

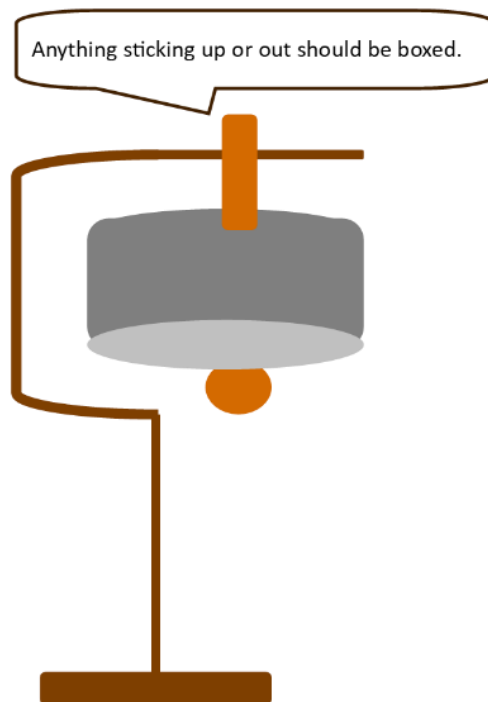


- Point out especially valuable items and make sure they get extra protection. Many times, packers and loaders won't know that a particular chair or vase is especially expensive or has lots of sentimental value. Also, take a picture of these items in case you need to make a claim later.

- Anything sticking up or out should be boxed and / or made smooth so that it does not stick up or out. Examples: fans, plaster chicken statutes, tops of desks, shelving, etc.

- All surfaces of anything you want protected should be covered with a blanket or some other protection, such as cardboard and / or lots of plastic wrap. (People tend to forget the bottom and legs.)

- If an item is extremely valuable, fragile, or has great sentimental value, you or they can do a “box in a box”:
 - You or they pack your item very carefully in a box with lots of padding and / or crumpled paper on all sides, top and bottom.
 - Put that box into a larger box and put lots of padding on all sides in between the two boxes, including the bottom.
 - Mark the box on the outside on all sides as “FRAGILE” and write an arrow showing which side is up.
- You or the packers need to help the transloaders (if you have transloaders) and unloaders by writing any special instructions in large letters on specific items such as “Glass / Vidrio”, “Fragile / Frágil”, “This side up / Este lado arriba (with an arrow)”, etc.



Loading

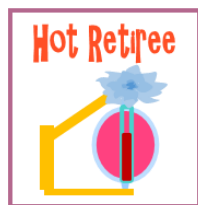


crush the lighter boxes.)

- Heavy items and boxes go towards the floor of the trailer, on the bottom, while lighter go on top. (Otherwise, the heavier items and boxes on top will

- As your household goods are being loaded into the trailer, you or your loaders must secure your items with several straps, at various places in the load, sectioning off areas, and especially at the back of the trailer (the end where the doors are). Items not secured with straps will tend to fall backwards as the truck moves forward.





After You Arrive in Mexico, Tips for Less Stressful and More Joyful Living

Hopefully, you're reading this section for the first time before your move, so you can get an idea of how your life will be afterwards. If so, good for you! Sometimes when we're in the midst of something, it's hard to envision what life will be like after it's all done, so hopefully, this chapter will help and make you feel confident. We'll start with the more "nuts and bolts" of living in Mexico and then move on to other, more fun topics.

Establish Your Healthcare Providers and Auto Mechanic

Healthcare and auto emergencies can happen without warning (and seemingly more than randomly on a weekend or national holiday), so it's a very good idea to establish your local providers as soon as possible. That way, when you do have that acute pain where you believe your appendix is located or that throbbing pain in your back molar on the left side, you will know who to call and they will know you.



After you arrive in Mexico, come in as soon as you can to your new doctor and dentist and provide the healthcare and dental records to your new provider you obtained just before you left (assuming you followed this guide) and exchange phone numbers.

It is not at all unusual for Mexican doctors and dentists to give their patients their cell phone numbers, so you can ask. That

way, when it's Mexican Independence Day and you just don't feel right, you will have a number to call and everything will turn out nice and easy.

While you're at it, it may be a good idea to visit your new auto mechanic and perhaps have them do a minor service, just so you can know if you want to use them again, and if so, to get their cell number so that if you blow out your tire during the Festival of the Virgin of Guadalupe, you'll know who to call.

- ☐ Personally visit your new doctor, give him or her a copy of your medical records and list of medications, discuss ongoing care, and exchange cell phone numbers.
- ☐ Personally visit your new dentist, give him or her a copy of your dental records, discuss ongoing care, and exchange cell phone numbers.
- ☐ Personally visit your new auto mechanic and get their personal cell phone number, just in case.

Television Service

I know of many Canadians who use some type of dish service so they can watch curling 24 / 7, but I don't know much more about either the service or the sport other than that they both exist.

Other people are happy with the Mexican service they receive as part of their cable service.



Many other expats use their home Wi-Fi connection to connect to TV service. A very popular one uses an Amazon Firestick to connect to what seems like pretty much all the television channels in the world. Not only can you watch curling direct from Canada, but you can also check out what they're watching in the Philippines, Iran or Israel. In addition, they also have what looks to me to be all the major US sports, entertainment, and news channels. The cost is very reasonable.

- ☐ Set up TV service.



Register with the US or Canada

Registering takes just a few moments, it's free, and it could come in handy in an emergency.

- ☐ If you are a US citizen, go to the website for the US Department of State Smart Traveler Enrollment Program in Mexico: <https://step.state.gov/step/index.aspx>
- ☐ If you're Canadian, go to the Registration of Canadians Abroad page: <https://travel.gc.ca/travelling/registration>

Online Shopping in Mexico

Unless you will live in Mexico in a huge city or if you don't buy a lot of things, there's a good chance you're going to want some items from North of the Border ("NOB"). You can ask your friends to bring these items with them when they visit you, you can go NOB to retrieve these items yourself, or you can buy online.

From my perspective, buying online in Mexico is great.

If you have a US Amazon account, you can enter your address in Mexico as one of your delivery addresses, and then ask Amazon to just show you items that can be shipped to your new home in Mexico, many times for very reasonable prices.

You should also definitely check out Amazon.com.mx, which is Amazon in Mexico. For some reason, if you enter search queries in English, they seem to generally work. You can use your same Amazon account (Amazon is pretty great) and same credit card, etc. Prices are in pesos and most of the items ship from within Mexico, but some do not. Those that come from the US or other places outside of Mexico are marked with "*importacion*" next to them, which means that you will pay more for shipping and import taxes.

We have also very happily purchased online from Costco.com in Mexico and my understanding is that Target.com in the US will also make deliveries in Mexico and that more companies are coming. Forever 21 has its own Mexican website. It should be getting easier all the time.

- ☐ Go to your existing Amazon account and enter your new delivery address in Mexico as an additional "ship to" address.
- ☐ Set up your Amazon.com.mx account.

- ☐ Set up your Costco.com.mx account.

Deliveries to Mexico

When you get to Mexico, if you have one of those addresses that companies can deliver to, great! If you don't, there are lots of companies here that will accept your packages for you at a commercial location known and knowable to the delivery companies and call you when your packages arrive. Then, you can go to retrieve your much-anticipated presents, all for a reasonable amount. And when you do this in Mexico, remember, you'll be in Mexico, so the prices will be much lower. Personally, I use iShop, but I know there are many others that provide the same service.



- ☐ Determine if Amazon and / or Costco or any of the other online retailers you plan on using will deliver to your home.
- ☐ If not, create an account at a local company that can receive your packages and call you for pickup at a reasonable price.

Foreign Earned Income Exclusion

If you are a US citizen, you must pay US federal income taxes forever, regardless of where you live or where your income originates or anything else I'm aware of. That's the bad news.

The good news is, if you qualify by living in Mexico, you may be able to exclude more than \$100,000 of earned income (not unearned income such as pensions) if you file single and more than \$200,000 if you file jointly from your US federal tax return. The way you do this is through the Foreign Earned Income Exclusion. Most (but not all) states also allow the exclusion.

- ☐ To learn more about the Foreign Earned Income Exclusion, see the article I wrote on it a few years ago (<https://www.thestreet.com/opinion/expats-may-be-able-to-avoid-paying-u-s-income-taxes-say-experts-13519656>), and then ask your qualified US tax preparer what he or she advises.

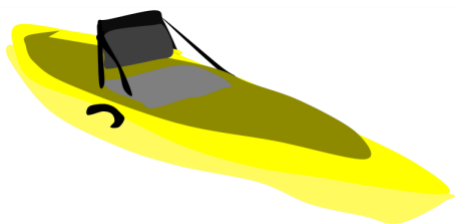
Growth and Reinvention

Moving to a new place, especially to a new country and especially where probably close to no one knows you, is a great chance for personal growth and what lots of expats I've interviewed call "reinvention," a topic I wrote about you can find here:

<https://www.marketwatch.com/story/want-to-reinvent-yourself-retire-abroad-2017-09-11>

You can also get my take for "How Living Abroad Made Me a Better Person" here:

<https://bestplacesintheworldtoretire.com/stories/moving-abroad-in-general/lessons-about-moving-abroad/how-living-abroad-made-me-a-better-person/>



When Americans and Canadians move to Mexico, most will find a culture that is less concerned with punctuality and perfection and more concerned with interpersonal relationships than they experienced NOB. Believe me, you are not going to change Mexican culture, so complaining about it only makes you more frustrated, unhappy and unlikeable.

A better course of action is just learn to see the good in the Mexican culture, relax, and try to become less of a Type A. Your blood pressure will go down, you will be more pleasant, and you may even learn that aspects of the Mexican culture are actually better and more appropriate for living here in Mexico for many things, and perhaps even better for life in general.

I'll give you an example. In the US, if a truck were blocking my way on a one-way street because the passenger had to get out and have a quick conversation with a store owner or had to unload a few items, I would be very unhappy. Here, I just wait those few moments and enjoy the day. The wisdom of my new reaction to this can be seen in my mental and emotional health, and also in my realization that I may have to do exactly the same thing as that truck driver later in the day and I would appreciate that everyone else didn't honk their horns, curse at me, give me bad looks, etc., and just acted patiently. It's just how life works here. We don't get all that worked up over items like this. Once you get used to it and learn to embrace it, it's very nice because you're much less worried about "doing something wrong." People are much more forgiving here for all sorts of things that would be horrific NOB.

And while we're on the subject of vehicular travel, you may find it interesting to know that when you get your car scratched or dented (and believe me, you will), it won't cost a fortune to repair it. Just before we moved here, I backed up into a wall in the US, which caused only minor damage to my bumper and the side of the car. The cost to repair it: USD \$1,200. In Mexico, that same repair would be the equivalent of around USD \$60 to fix it like it never happened. With costs like that, your old habit of having your month ruined when you got a scratch or a ding in your car will eventually just fade away. When you do get a scratch or a ding in Mexico, after you've been here for a while, instead of responding with a string of curse



words running through your head, regret, remorse and anger, you'll just think "so what?" Then, you may even laugh a bit to yourself as you compare your new response with your old one. That's what I did.

A great tool for your growth or reinvention (if you're into that type of thing) is to learn as much Spanish as you can. Doing so will not only make you much more comfortable living in a Spanish-speaking country, but it will also make you more confident, competent, relaxed (and who doesn't want that?), and also more able to better enjoy more of the people you come into contact with every day.

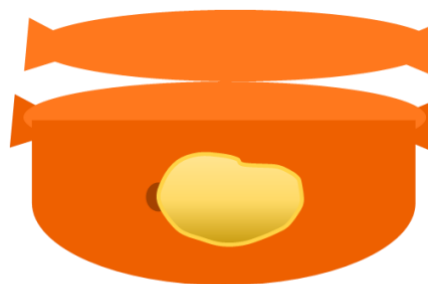
Please don't worry if you botch your Spanish. The Mexican people are thrilled and honored that you are even trying. Let's honor them as well by trying to learn their language, at least a little bit. Doing so will spread goodwill, make you lots of new friends, and make your life here much, much more enjoyable. You will be able to integrate into the larger community here (not just the English-speaking expat one), be less isolated, be better in an emergency, and make lots of very good friends.

You don't have to learn all at once; you can learn Spanish at your pace. There are lots of good alternatives. One I've been using lately is Duolingo. You go as fast or slowly as you wish, it's fun, it seems to work, and it's free.

You absolutely don't have to be fluent or perfect in Spanish in order for to make a huge impact on your life and the lives of Spanish-speaking people around you. Please don't pass up this opportunity. Maybe you can sign up today for an app, a program on your computer or a class.

Now that you're here (or will soon be) our hope for you is that you enjoy the lower cost of living, the lower stress, the wonderful weather, perhaps some decorating of a new home, the time to undertake those hobbies you've always wanted to do but didn't have the time for, your comfortable and reassuring household goods, and the friendly people. We wish you great success. *Bienvenidos!* (Welcome!)



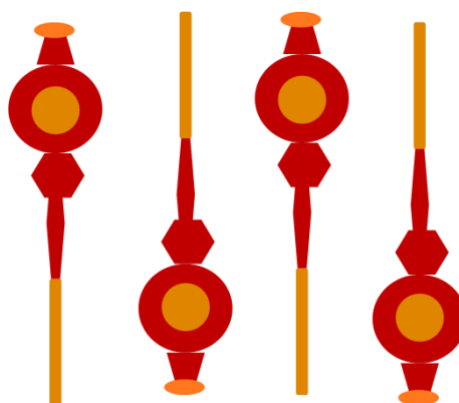
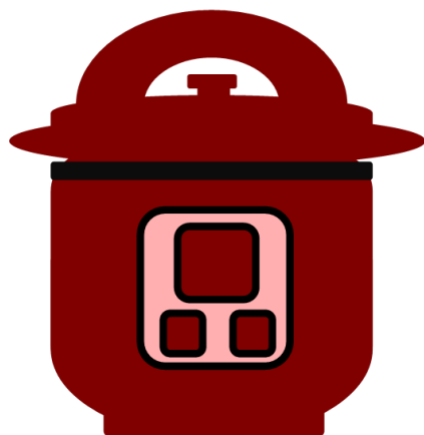


Potlucks are de rigueur.



Tap water is iffy.

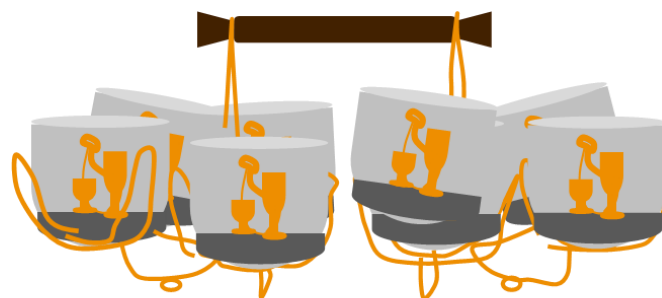
Helps soften the tough meat.



Sentiments get stronger.



Keep the bugs at bay.



Lots of socializing



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<https://bestmexicomovers.com/what-you-need-to-know-to-move-your-household-good-to-mexico-guide/>

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